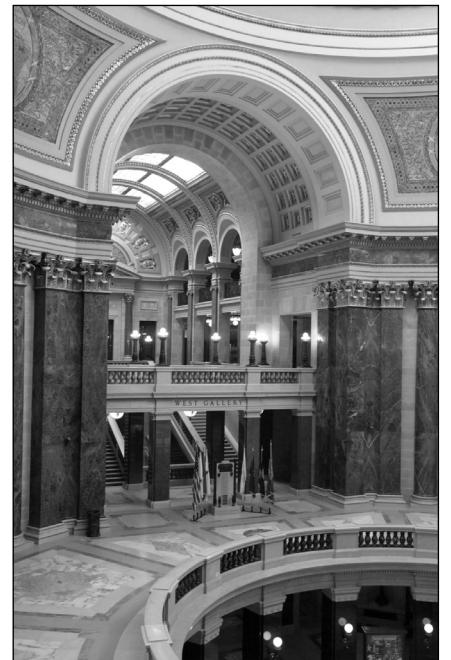


Wisconsin State Senate Policy Manual



2013-2014

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2013-2014

Adopted by the Committee on Senate Organization
On January 25, 2013

This document is intended to function as a general guide and reference relative to employment with and operations of the Wisconsin State Senate. This document and the information contained, referred to, or mentioned herein, are not intended to create nor should be construed to constitute a contract of employment between the Senate and any one or all of its employees. There is no expectation of continued employment with the Wisconsin State Senate.

Since no policy manual can address every situation that may arise, it may be necessary to modify or vary from this policy manual. The right to modify, amend, add or delete any policy, procedure or benefit set forth in this policy manual, at any time, for any reason, with or without notice, is reserved by the Committee on Senate Organization.

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I. Employment

Employment-at-Will

All employees of the Senate are in the unclassified, non-represented service and, as employees of the legislative branch of state government, are subject only to those rules and laws governing unclassified non-represented employees of the Senate. In most cases, the Senate determines which of these rules and laws apply to Senate employees. Employees serve at the pleasure of the appointing authority (Senator, Senate Chief Clerk and Director of Operations (hereafter “Chief Clerk”), Senate Sergeant at Arms) and the employment relationship may be terminated by the appointing authority or by the employee at any time without cause or notice. There is no expectation of continued employment with the Senate.

Equal Employment Opportunity

The Senate is committed to providing equal employment opportunity in all terms, conditions, and privileges of employment, including but not limited to recruitment, certifications, selection, job assignments, working conditions, fringe benefits, compensation, training, transfer, layoffs, disciplinary actions, terminations, and promotions.

The Senate does not discriminate in employment on the basis of race, sex, religion, class, national origin or ancestry, age, disability, sexual orientation, arrest or conviction record, or any other applicable protected classification as specified by state and federal law, except as permitted under applicable law.

Harassment by supervisors or co-workers in employment or service delivery on the basis of race, sex, religion, class, national origin or ancestry, age, disability, sexual orientation, arrest or conviction record, or any other applicable protected classification as specified by state and federal law is an unlawful employment practice prohibited in the Senate. The Senate provides reasonable accommodations for disabled individuals to ensure equal access to employment.

Senate employees should not be expected to run personal errands for their appointing authority, or engage in any other activities not related to the official business of state government.

Please refer to Harassment and Discrimination in the Appendix for the complete policy.

Equal Access to Program Services and Contracts

The Senate is committed to providing fair and equitable service to the public. The Senate does not discriminate in any program, activity, or procurement on the basis of race, sex, religion, class, national origin or ancestry, age, disability, sexual orientation, political affiliation or belief, and arrest or conviction record, or any other protected classification as specified by state and federal law. The Senate will make reasonable accommodations to ensure equal access to program services and contracts by individuals with disabilities. Anyone in need of reasonable accommodation should contact the Chief Clerk’s or Sergeant’s office.

Compliance Procedure

The Senate provides a copy of the Senate's equal employment opportunity compliance procedure to all employees and posts the same on bulletin boards. The procedure provides for prompt and fair resolution of complaints alleging harassment and/or discrimination in employment. Any Senate employee who believes he or she has been the victim of prohibited harassment and/or discrimination in employment may contact any member of the Committee on Senate Organization, the Chief Clerk, and/or the Legislative Human Resources Office (LHRO) concerning such complaint without foreclosing any other means of possible redress.

Implementation of Employment Policies

All appointing authorities are directly responsible for successful application of all employment policies.

Staff Allocation

The Committee on Senate Organization determines the biennial staffing allocation for each office. Generally, the total number of positions with fringe benefits is limited within each office. In addition, the total amount that each Senator may spend on benefited employees and limited term employees (LTE's) is limited. The Chief Clerk shall promptly notify each office of the staffing allocation established by the Committee on Senate Organization after the allocation is determined. Information on the current staffing allocation is available from the Chief Clerk's office.

Job Sharing

The appointing authority may authorize the sharing of not more than one authorized benefited position within his or her office if both individuals work a combined total of 100% time and the arrangement is expected to continue for a minimum of one year. Requests for job sharing must be reviewed by the Senate Chief Clerk to verify compliance with Chapter 3 of the Wisconsin Retirement System Manual (ET-1127).

Assignment of Classifications and Steps

The Committee on Senate Organization has adopted guidelines for determining each employee's classification and step level. These guidelines may be adjusted by the Chief Clerk in consultation with Senate leadership.

The Chief Clerk shall make a determination of each new employee's proper classification and step level, according to these guidelines. Upon request by the appointing authority, the Chief Clerk will inform the appointing authority of each employee's maximum eligibility level, and with the consent of the appointing authority, adjust the employee to the proper classification and step level. An employee may transfer to the Senate from another state agency without loss of pay status providing the employee qualifies for the salary under the Senate guidelines. This does not exempt the employee's salary from any applicable salary budget.

A Senator may provide a letter to the Chief Clerk initiating a new hire at any time during the current pay period, effective the first day of the current pay period. Any request to put into effect an employment start date before the first day of the current pay period will be denied.

Compensation Adjustment

A General Wage Adjustment may be granted as provided by law and determined by the Joint Committee on Legislative Organization (JCLO). The salary allotment for staff and compensation ranges may be adjusted accordingly. Available salary increases, however, are granted at the discretion of the appointing authority. A Senator may provide a letter to the Chief Clerk granting a salary increase at any time during the current pay period, effective the first day of the current pay period. Any request to put into effect a salary increase before the first day of the current pay period will be denied.

Hours of Work - Compensatory Time

Within each pay period, each full-time Senate staff member shall work at least an average of 40 hours each workweek. If leave is used, the total amount of work plus authorized leave must average a total of at least 40 hours per workweek for the pay period, as indicated on the employee's electronic Senate Time Reporting In/Out System (TRIO) timesheet. Work will be scheduled at the discretion of each appointing authority to allow completion of assigned tasks on schedule and to ensure that each employee works the minimum number of hours. There is no additional compensation for overtime work, as salaries are considered to be commensurate with employee responsibilities. Compensatory time off is not an official benefit conferred by the Senate. However, recognizing the irregularities of the Senate's schedule and the variable work load during different time periods, the appointing authority may, at his or her discretion, authorize an employee compensatory time off for hours worked in excess of the minimum. An employee may not engage in campaign activity while on compensatory leave. Any compensatory time off granted by the appointing authority must be used during the legislative biennium in which it is earned, unless the appointing authority specifies a shorter time period for usage. Unused compensatory time off is forfeited at the end of the biennium or such shorter time period as specified by the appointing authority. Please note that when an employment relationship is terminated, the employee cannot receive payment for unused compensatory time off.

Paid Time Off

Holidays

The following paid holidays are granted each year:

January 1
The third Monday in January
The last Monday in May
July 4
The first Monday in September
The fourth Thursday in November
December 24
December 25
December 31

Section 230.35 (4) (a) 10., Stats., states that if the holidays of January 1, July 4, or December 25 fall on a Sunday, the “day following” shall be the paid day off for that holiday. If these days fall on a Saturday or if December 24 or 31 falls on a Saturday or Sunday, the employee will receive 8 hours of vacation leave to use as authorized under Senate policy.

The above paid holidays are automatically entered into TRIO and therefore do not need to be reported by the employee.

Jury Duty

If called for jury duty, an employee receives full pay without loss of vacation time. Remittance of jury pay is not required.

Vacation Leave

Vacation leave (including personal days described below) may be taken with the prior approval of the individual’s appointing authority, i.e., Senator, Chief Clerk, or Sergeant at Arms. An employee who will engage in campaign activities while on vacation leave must notify the Chief Clerk of the use of vacation leave before the leave is taken. See Time Reporting policy on page 7.

Vacation leave is earned on a monthly basis and must be earned before it is used. Vacation leave is granted as follows, based upon experience as an employee of the state:

1-5 years	10.00 hours/month	120 hours/year	15 days/year
5-10 years	13.34 hours/month	160 hours/year	20 days/year
10-15 years	14.68 hours/month	176 hours/year	22 days/year
15-20 years	16.68 hours/month	200 hours/year	25 days/year
20 + years	18.00 hours/month	216 hours/year	27 days/year

Employees with at least 15 years of service can elect to receive a cash payment for up to 40 hours of vacation leave each year.

Vacation leave may also be granted if certain paid state holidays fall on a Saturday or Sunday.

Vacation leave may be carried over from one year to the next. Please note that when an employment relationship is terminated, the employee cannot receive payment for more vacation time than can be earned in one year regardless of the cumulative amount.

If an employee uses more vacation leave than the employee has been granted, the unearned balance will be subtracted from the employee's pay.

Employees are entitled to 4.5 personal days per year. Personal days are treated as vacation leave, except that personal days are earned immediately upon employment or, for continuing employees, on January 1, and must be used in the calendar year in which they are earned. Personal days will be deducted first from any vacation leave used.

Sick Leave

Employees begin to earn sick leave immediately upon employment. 10.84 hours of sick leave accumulate each month, up to a total of 130 hours per year. Unused sick leave is accumulated from year to year without limit and without written approval from any appointing authority.

Sick leave may be used for absences for personal injury, illness, maternity, exposure to contagious disease, and attendance upon members of the immediate family when such presence is required, or upon a death in the immediate family of the employee or employee's spouse.

Three days of sick leave, plus required travel time not to exceed 4 additional work days, may be used for the funeral of a member of the immediate family. "Immediate family" means:

- Parents, stepparents, grandparents, foster parents, children, stepchildren, grandchildren, foster children, brothers (and their spouses), sisters (and their spouses), of the employee or employee's spouse;
- The spouse;
- Aunts and uncles, sons-in-law or daughters-in-law of the employee or employee's spouse, and;
- Other relatives of the employee or employee's spouse providing they reside in the same household of the employee.

A Senator who is recorded as absent at a session day or committee meeting or other applicable legislative function, as determined by the Senator, shall notify the Chief Clerk in writing of the need to debit his or her sick leave balance an appropriate amount if the absence was by reason of one of the circumstances described above. The LHRO shall maintain copies of notifications in the same manner as other personnel records.

Leave of Absence

A leave of absence and the use of sick and/or vacation leave during such a leave of absence must be approved in advance, in writing, by the appointing authority. The LHRO must provide the Senator with the proper leave form, specifying the beginning date and ending date of the leave, the purpose for the leave, and whether the employee is being allowed to use sick and/or vacation leave, or whether the leave is unpaid. Employees may elect to maintain their insurances during a leave of absence for up to 5 months by prepaying their insurance premiums on their last payroll prior to their leave of absence.

The Legislature will automatically make premium prepayments for you unless you decide to cancel the coverage. Please note that there are limitations on timing and re-enrollment. Contact the LHRO to discuss these options.

Employees must make arrangements with the LHRO to extend their insurances beyond the 5 month time period – the employee is responsible for both their share and the state’s share of premiums beyond the initial 5 month period. Upon the commencement of an unpaid leave of absence, the individual is no longer considered an employee of the Senate for the purpose of time reporting or staffing allocations.

Should an outside entity wish to voluntarily reimburse the State of Wisconsin for any or all of these employer costs during the initial 5 month period, they may do so. The outside entity is responsible for making sure that payment is made in a timely fashion. Make the check payable to the State of Wisconsin, put the employee’s name and “benefit state share – LOA” in the memo area and send the check to Legislative Human Resources Office, P.O. Box 7882, Madison, WI 53707-7882.

Family Medical Leave

An employee can take Family Medical Leave (FML) for certain family or medical reasons. Twelve weeks are available during a single 12-month period. The FML must be pre-approved when possible by the appointing authority before leave begins. A form to request FML is available from the LHRO. Medical proof of necessity for the FML may be required. Employees may use sick, vacation, and/or personal time, or go unpaid. Prepayment of insurance premiums is required. The Chief Clerk’s office and the LHRO should be notified as soon as possible upon return to work. Twenty-six workweeks of leave during a single 12-month period to care for a covered service member with a serious injury or illness who is the spouse, son, daughter, parent, or next of kin to the employee (military caregiver leave) may also be available.

Military Leave

Due to the complexity of State and Federal laws regarding military leave, an employee who is ordered to active duty or required to be absent from work for annual active duty training should contact the LHRO as soon as possible to review all benefits and pay requirements that apply as a result of the active duty or absence.

Workers Compensation

If an employee suffers an injury or illness, as a result of his or her employment, provisions of the Worker’s Compensation Act cover medical expenses and wage loss. Contact the LHRO as soon as possible to report the injury or illness.

Honoring Deceased President

Each Senator may close his or her office on a date designated by the President of the Senate following the death of any U.S. President in commemoration of the life and public service of that President. Any employees in offices that are closed shall claim vacation or personal leave time, compensatory time (if granted by the employee’s appointing authority), or any combination

thereof totaling 8 hours. Additional vacation, compensatory, or personal leave time will not be granted.

Nepotism

An appointing authority may not hire as a Senate employee the appointing authority's spouse, parent, grandparent, child, grandchild, brother, sister, parent-in-law, grandparent-in-law, brother-in-law, sister-in-law, uncle, aunt, niece, or nephew.

Pay Period

The normal pay period for employees of the Senate is monthly. Regularly processed monthly paychecks are dated for the first day of each month. Checks will be distributed in the LHRO's Capitol Annex office located adjacent to the Chief Clerk's office. Otherwise, checks should be picked up in the LHRO on the first working day of the following month. Out-of-town personnel will have their checks mailed directly to them. Personnel who are absent for vacation or other special circumstances may have their checks mailed to their home or bank. Direct deposit of checks is also available. Please contact the LHRO in advance for either of these services.

Resignations and Terminations

An employee who is terminating employment with the Senate should provide notice as soon as possible to the Chief Clerk and the LHRO. If the employee is benefited, an appointment should be set up with the LHRO to discuss the impact leaving state employment will be upon benefits and other aspects of employment. If a Senator leaves office before the expiration of his or her term, only benefited employees of that office may continue employment until a successor takes office, unless the employment is terminated by the appropriate party leader (i.e., Majority or Minority Leader). Until a successor takes office, the office is under the supervision of the appropriate party leader (i.e., Majority or Minority Leader).

Severance Pay

When employment is involuntarily terminated, the appointing authority may authorize up to two weeks of pay as a severance benefit. The payment of the severance benefit is charged against the Senator's salary account in the same manner as if the employee were on the payroll. The Senator may fill the position immediately upon termination.

Alternatively, the appointing authority may schedule the termination date up to two months in advance, direct the employee to refrain from coming to work, and authorize the employee to remain on the payroll until the termination date through the use of accumulated vacation and personal leave. The payment of salary during the severance period is charged against the Senator's salary account in the same manner as if the employee were present. The Senator may fill the vacancy only after the termination date.

Time Reporting

All hours worked and taken off with pay must be reported on TRIO (<http://trio/Calendar.aspx>). The printed, signed monthly TRIO timesheet submitted to the LHRO is the official record of hours of employment. Any electronic data concerning an employee's timesheet is considered

unofficial, draft timesheet data. The monthly timesheet must be printed and signed by the employee and the appointing authority, and submitted to the LHRO by the 7th day of each month following the month for which reporting. After the report is printed, any adjustment to time must be noted manually on the printed copy and initialed by the employee and the appointing authority. Any timesheets not received by the 15th day of the month following the month for which reporting, will result in the employee's direct deposit being terminated, if applicable. If the 15th falls on a weekend, the deadline will extend to the end of the day on the following Monday. A pay check will not be distributed to any employee who has not submitted a timesheet.

Rule Relating to Time Reporting, Campaign Activities, Employee Protection, and Continuing Ethics Education

A. Reporting Requirements:

1. **Employees to submit reports.** All employees are required to certify the dates and hours worked, and to certify they did not engage in campaign activity during hours to be compensated by the State.
2. **Appointing authority to review and certify.** Each appointing authority shall review such certifications, and countersign certifying that no campaign work was assigned to such employee during hours of employment, and that to the best of the appointing authority's knowledge, information and belief, the employee did not engage in campaign activity during hours of employment.
3. **Reports for compensated campaign activity.** All employees are required to notify the Chief Clerk in advance if they will be engaging in campaign activity for which they receive compensation and, if possible, list the dates and hours during which they will be so employed.

B. Standards of Conduct:

1. **Campaign activity defined.** As provided in this rule, the term "campaign activity" means activity that does not reasonably and primarily fulfill and arise from official duties and that contributes to, enhances, or furthers a person's ability to run for, or chance of election or reelection to public office. Illustrative activities include:
 - a. Arranging or assisting in arranging a campaign-related event or the raising of campaign contributions.
 - b. Soliciting, receiving, or acknowledging campaign contributions.
 - c. Preparing or distributing television, radio, newspaper, or other forms of campaign advertisements.
 - d. Preparing or designing campaign brochures, literature, nomination papers, or other campaign promotional materials.
 - e. Distributing or arranging for the distribution of campaign materials.
 - f. Directing, seeking or coordination of campaign volunteers.

- g. Preparing a campaign budget.
 - h. Directing or participating in get-out-the-vote drives.
 - i. Creating, maintaining, editing, adding to, or deleting information from a list or database of campaign contributors or supporters.
 - j. Creating, maintaining, editing, adding to, or deleting information from a list or database designed or intended for a campaign purpose.
 - k. Preparing or coordinating polling operations for a campaign purpose.
 - l. Transporting voters to polls or campaign rallies.
 - m. Preparing campaign finance reports required by law.
 - n. Directing or participating in candidate recruitment.
2. **Legislators/supervisors not to assign campaign work.** A member or supervisor of legislative employees may not assign, authorize, or request an employee of the Legislature to engage in campaign activity to be performed while the employee is on state time, with the use of state resources, or on state property.
3. **Legislative employees not to engage in campaign activity in state offices or on state time.**
- a. An employee of the Legislature may not assign or authorize campaign activity to be performed on state time or in state offices.
 - b. An employee of the Legislature may not use, or make available for use by another, state property or resources in connection with campaign activity, except as the property or resources are normally available to anyone under similar circumstances.
 - c. An employee of the Legislature may not engage in campaign activities
 - i. During hours of employment claimed;
 - ii. While on any form of paid leave (including “comp” time) other than vacation time and then only after having submitted to the Chief Clerk a request to use vacation time and a finding by the appointing authority that the leave will not be contrary to the interests of that house;
 - iii. During regular hours of employment unless the employee has submitted to the Chief Clerk a request to work variant hours or for unpaid leave and a finding by the appointing authority that such variant hours or unpaid leave will not be contrary to the interests of that house.
- C. **Employee Protection.** It shall be part of an employee’s term of employment that no decision affecting an employee’s continued employment, salary, benefits, or the terms, hours or other conditions of the individual’s employment may be based in any manner or to any degree on the employee’s failure to participate in campaign activities or failing to make a political contribution.

D. **Continuing Education.** Each house of the Legislature shall require the attendance of its employees at seminars conducted by the Government Accountability Board on the standards of conduct and work rules:

1. In January of each odd-numbered year, and
2. During the month of May or June of each even-numbered year.

The Legislature shall provide resources to obtain the services of experts for faculty from a variety of entities, such as the Government Accountability Board, University of Wisconsin, National Conference of State Legislatures, and other recognized individuals. Each current employee shall attend a seminar within 12 months of adoption of this rule and each new employee will attend the first seminar offered after the commencement of his or her employment. Each employee shall thereafter attend a seminar at least once every 4 years. Alternative methods shall be developed for providing training on standards of conduct and work rules, to provide opportunities for attendance by those who may be unable to attend scheduled sessions. Failure to attend a seminar or use alternative training methods may result in withholding of compensation.

E. **Violation of rule as prima facie evidence of violation of s. 19.45(5), Wisconsin Statutes.** A member's or legislative employee's intentional violation of this rule may be evidence of an unlawful use of state resources.

Distribution of Rule. The Chief Clerk shall distribute a copy of this rule to every new employee upon hiring. As a term of employment and eligibility to receive payment of salary or compensation, the employee must provide the Chief Clerk with written acknowledgement of the information's receipt.

II. Office and Salary Accounts

Senate Salary Account

The Senate salary accounts are established at the beginning of the biennium by the Committee on Senate Organization.

Senate Office Expense Account

The total office expense allotment for the 2013-2014 biennium is \$55,955 per Senate district. The office expense allotment may be used only as permitted in the Senate Policy Manual.

Salary

Pursuant to the State Constitution, a Senator's salary remains the same for the two year legislative session. For the 2013 Session of the Wisconsin Legislature the annual salary is \$49,943.00.

Senate Leadership Accounts

The following budgetary accounts may be used by the applicable member of Senate leadership during the 2013-2014 biennium for any expense that is otherwise permitted to be paid out of the office expense allotment and that, in the opinion of the Senator, is directly related to the Senator's duties as a leader:

- Majority Leader \$12,000
- Minority Leader \$12,000

The Senator must notify the Chief Clerk's office which expenditures should be allocated to the Senator's leadership account. The Senator may direct that amounts be transferred from the leadership account to his or her office expense account or salary account.

Allotment Carryover

Senators may not carry forward any portion of the office expense account, leadership account, or salary account allotment into the next legislative session.

III. Policies and Procedures

Access to Capitol Press Room and Other Press Areas

Accredited correspondents of the news media, who confine themselves to their professional duties, may have access to the Capitol press room and to the press lobby within the Senate Chamber only if they possess a valid, permanent or temporary, registration card issued by the Senate and the card is worn in a visible location. Access to other areas within the Senate Chamber are otherwise prohibited. This policy does not prohibit legislative employees or employees of the Department of Administration, or individuals performing duties under contract with either house of the Legislature or the Department of Administration, from accessing these areas as otherwise authorized. This policy does not limit the authority of the presiding officer to have individuals removed from the Senate Chamber pursuant to Senate Rules.

Additional Employment and School Attendance

Senate staff members are employed for purposes of providing services required in the legislative process. Because of the nature of that process and the occasional extended time demands placed on Senate staff, all Senate staff shall notify the Chief Clerk in advance if they will be engaging in additional employment and, if possible, list the dates and hours during which they will be so employed. Report of school attendance and classroom schedule is also required. See **Time Reporting** policy relating to paid campaign work on pages 7-10.

Addresses to the Senate

Addresses to the Senate are only allowed after prior approval by the Committee on Senate Organization.

Alcoholic Beverages

Senate employees may not consume alcoholic beverages in the Capitol during normal working hours.

Attorney Policy

State law provides for the indemnification of state officers and employees in certain circumstances. In addition, under the Wisconsin Constitution, the Senate has inherent authority to obtain legal counsel for itself, its members, and its employees. The policies that follow outline the general processes applicable to retention of legal counsel in the Senate.

Defending Against Civil Charges

Obtaining Representation for a Majority Party Senator

If a majority party Senator requires legal representation in a civil legal proceeding and if, in the Majority Leader's opinion, the acts or allegations underlying the action were arguably within the scope of the Senator's duties as a Senator, the Majority Leader may direct the Chief Clerk to do

one of the following: (1) request representation for the Senator by the Department of Justice; (2) authorize the Senator to obtain outside representation, with the cost of such representation to be paid by the Senate; (3) or, if applicable, reimburse or pay attorney fees and costs already incurred. If the Majority Leader requires legal representation in a civil legal proceeding, the determination concerning scope of duties and the direction to the Chief Clerk shall be made by the President.

Obtaining Representation for a Minority Party Senator

If a minority party Senator requires legal representation in a civil legal proceeding and if, in the Minority Leader's opinion, the acts or allegations underlying the action were arguably within the scope of the Senator's duties as a Senator, the Minority Leader may direct the Chief Clerk to do one of the following: (1) request representation for the Senator by the Department of Justice; (2) authorize the Senator to obtain outside representation, with the cost of such representation to be paid by the Senate; (3) or, if applicable, reimburse or pay attorney fees and costs already incurred. If the Minority Leader requires legal representation in a civil legal proceeding, the determination concerning scope of duties and the direction to the Chief Clerk shall be made by the Assistant Minority Leader.

Obtaining Representation for an Employee

If a Senate employee requires legal representation in a civil legal proceeding, he or she may contact the Chief Clerk and request representation. Upon receiving such a request, the Chief Clerk may do any of the following: (1) request representation for the employee by the Department of Justice; (2) authorize the employee to obtain outside representation, with the cost of such representation to be paid by the Senate; (3) or, if applicable, reimburse or pay attorney fees and costs already incurred.

If the Chief Clerk refuses to authorize state-paid representation for the employee because, in the Chief Clerk's opinion, the acts or allegations underlying the action were not arguably within the scope of the employee's duties as an employee, the Chief Clerk may not reimburse the employee for or pay any attorney fees or costs. However, if a court, jury, or other duly authorized tribunal makes a finding that the employee was acting within the scope of his or her duties as an employee for all or a portion of the allegations, the Chief Clerk shall reimburse the employee for or pay attorney fees and costs in the matter with regard to that portion of the allegations that were within the scope of the employee's duties.

Other Information

If the Department of Justice provides representation, the Chief Clerk may not reimburse the Senator or employee or pay any other attorney fees or costs.

This policy permits only the payment or reimbursement of reasonable attorney fees and costs. Unless otherwise determined by a court, jury, or other duly authorized tribunal, the Senator or employee determines whether the amount of attorney fees and costs is reasonable.

Defending Against Criminal Charges

If a Senator or Senate employee is a defendant in a criminal prosecution, he or she may obtain outside representation at his or her own expense. If a court, jury, or other duly authorized tribunal determines that the acts alleged in the complaint were within the scope of the Senator's or employee's duties as a Senator or Senate employee and if the Senator or employee is not convicted of a crime, the Senate will reimburse the Senator or employee for the attorney fees and costs in the matter.

This policy permits only the payment of reasonable attorney fees and costs. Unless otherwise determined by a court, jury, or other duly authorized tribunal, the applicable Senator or employee determines whether the amount of attorney fees and costs is reasonable.

Other Legal Representation of Senators and Employees

Other circumstances may arise in the course of a Senator's or Senate employee's service in the Senate requiring the Senator or employee to obtain legal representation. The Committee on Senate Organization may approve the retention of legal counsel by the Senator or employee and the payment of attorney fees and costs if the committee determines that the need for legal representation arose from the Senator's or employee's performance of his or her duties in the Senate. The Committee on Senate Organization may decide that the underlying facts of the matter do not justify retention of legal counsel or payment by the Senate. If the matter results in criminal charges being filed against the Senator or employee, the Chief Clerk shall stop reimbursing or paying attorney fees and costs in the matter. If the Senator or employee is ultimately found guilty of a crime in the matter, the Senator or employee must repay the Senate for all attorney fees and costs reimbursed or paid by the Senate in the matter. If the matter concerns an investigation, the Senator or employee must sign a statement agreeing to this repayment in advance of any fees or costs being paid by the Senate.

This policy permits only the payment of reasonable attorney fees and costs. Unless otherwise determined by a court or jury, the applicable Senator or employee determines whether the amount of attorney fees and costs is reasonable. In addition, the Senate will not reimburse or pay attorney fees and costs if the Senator or employee is represented by the Department of Justice.

Legal Representation of the Senate

The Committee on Senate Organization may approve the retention of legal counsel and the payment of reasonable attorney fees and costs for purposes of pursuing legal claims on behalf of the Senate and for any other purpose deemed appropriate by the committee.

Audio-Visual Technology

LTSB shall assign uniform audio-visual equipment and software to the offices of Majority Leader and Minority Leader. Equipment assigned under this provision may be used only by staff of the applicable leader or Senate employees under the direction and supervision of the staff of the applicable leader. Activities for which the Majority Leader's or Minority Leader's equipment may

be used primarily include communication of state government information to citizens and constituents.

Equipment assigned under this provision may be used only for activities directly related to the affairs of state government and may not be used for political campaign or personal purposes or for purposes of capturing and using footage in a way that negatively represents any Senator or detracts from the dignity and decorum of the Senate.

Bottled Water Service

Bottled water may be purchased for a Senate office and paid for or reimbursed out of the Senator's office expense account. Contact the Chief Clerk's office for assistance.

Cable TV in Capitol Offices

Cable TV connections in Senate Capitol offices are available through Charter Communications, the local cable provider. The connection can be activated solely at the direction of the Senator. To activate cable TV, contact the Chief Clerk's office to set up the account. The cost for cable TV and for the activation of any other approved broadcast mechanism will be charged to the Senator's office expense account.

Campaign Activity

No state facility, office equipment, supplies, etc., may be used for political campaign purposes at any time. See **Time Reporting** policy relating to campaign work on pages 7-10.

Campaign Committee Activity

1. No personal campaign committee as defined in s. 11.01, Stats., may schedule a fund raising social event in Dane County during a floor period of the Legislature as scheduled by Joint Resolution at the beginning of the legislative session.
2. During the period between the first day authorized for filing nomination papers for any office for which a current member of the Senate is a candidate and the date of the election for that office, that member's personal campaign committee for that election may schedule a fund raising social event during a scheduled floor period within the boundaries of the office for which the current member of the Senate is a candidate, regardless of the restriction in paragraph 1.

Capitol Police and Emergency Evacuations

General Information

Fire or Medical (Emergency Personnel)	9-911
Capitol Police (Emergency)	6-7700
Capitol Police (Non-emergency)	6-8797

Please refer to the Capitol Safety and Security Guidelines Manual for all issues related to emergency procedures. A copy of this manual will be provided to each employee and can also be found online at the Sergeant's website.

Caucus Meetings

The corridors and areas immediately outside of the respective partisan caucus rooms shall be kept clear at all times during caucus meetings. Access to the caucus meetings that are open to the public is limited to space available in the room. During periods of closed caucus, loitering in the areas adjacent to the meeting rooms is prohibited.

Citations

Citations may be obtained as provided under Senate Rule 98 and Joint Rule 7. The proposed content of citations should be sent electronically to the Chief Clerk's office. If a citation is placed on a plaque or in a cover folder, the cost will be charged to the Senator's office expense account. A minimum of five business days should be allowed for any citation.

Communications Activities

Legislative staff is prohibited from:

- a. In the case of an audio/video clip that contains a reference to or depiction of an elected state official who becomes a candidate for national, state, or local office, disseminating the audio/video clip in any way after the first day authorized by law for circulation of nomination papers as a candidate for that office. This policy does not require clips previously posted to a legislative website to be removed and does not prohibit communications authorized under s. 11.33 (2), Stats.
- b. In the case of an audio/video clip that contains the recorded voice or image of an elected state official other than the staff person's appointing authority, disseminating the audio/video clip without the written authorization of that elected state official. It is not a violation of this policy; however, to prepare or disseminate an audio/video clip that includes such a recorded voice or image only as background due to the camera angle or microphone placement from which the original audio and video were acquired.

It is the responsibility of each legislator to ensure that all audio/visual clips prepared and disseminated at his or her request are in compliance with this policy.

Computer Usage; No Expectation of Privacy

The Wisconsin State Legislature's electronic mail system, assigned computer workstations and laptops, computer network, and Internet services (hereinafter referred to as "computer system") are powerful communication and productivity tools. Employees and Senators may use the computer system for Senate business. In addition, as a benefit of employment, the Senate allows each Senator and employee to engage in limited personal use of the computer system, provided the use does not impinge upon the completion of his or her job duties and is consistent

with the policies below. In addition to providing a quality work environment for Senators and employees, allowing this limited personal use will help ensure that Senators and employees are proficient in the use of these communication and productivity tools.

While using the computer system, a Senator or employee is acting as a representative of the Senate and an employee is acting as a representative of his or her appointing authority. As such, Senators and employees should act accordingly so as not to damage the reputation of the institution. Employees and Senators may not use the computer system to communicate under a hidden, false, or alternate identity.

United States copyright and patent laws protect the interests of authors and software developers in their products. It is against federal law and Senate policy to violate the copyrights or patents of others on or through the Internet. Any infringing activity by an employee or Senator may be the responsibility of the Senate. Therefore, the Senate may choose to hold the Senator or employee liable for his or her actions.

Employees and Senators may not use the computer system to promote their personal business interests, engage in discrimination or sexual harassment, engage in political campaign activity, engage in any unlawful activity, intentionally access or facilitate access to pornographic material, send mass mailings (except mass mailings that are approved by the Senator), play computer games, gamble, or obtain personal gain.

Violations of these usage policies by an employee may result in discipline, up to and including termination.

Internet usage by individual users is generally not tracked, except as may be provided in the Internet browser's history file on the user's local hard drive. However, any information associated with use of the computer system may be monitored, tracked or accessed at any time by the user's appointing authority or, with the appointing authority's consent, by the Chief Clerk. Users should have no expectation of personal privacy with regard to any information associated with their use of the computer system. LTSB may facilitate any authorized monitoring, tracking, or access under this policy only upon request of the user's appointing authority.

Please note that, although users should have no expectation of personal privacy with regard to their usage of the computer system, certain information may not be subject to disclosure under the Wisconsin Open Records Law. For example, under case law, certain personal emails are not subject to public inspection under the Wisconsin Open Records Law. Offices that receive a request for access to electronic records under the Wisconsin Open Records Law should contact the Chief Clerk.

Please refer to "Guidelines Regarding Legislator and Legislative Staff Use of State-Supported Websites and Social Networking Technology" in the Appendix for additional information.

Computers in the Senate Chamber

Computers may not be used in the Senate Chamber during session, except: (a) By individuals working in the area reserved for the press who possess a valid, permanent or temporary registration card issued by the Senate; (b) By one member of the Majority and Minority leader's

staff occupying the staff area directly behind the leader; (c) By any Senator or Senate staff, provided the computer is a tablet computer such as an iPad; (d) By the Chief Clerk's staff and (e) by LTSB staff. This policy does not limit the authority of the presiding officer to maintain order in the Chamber. This policy does not authorize the expenditure of state funds to purchase tablet computers and does not authorize LTSB to provide technical support for tablet computers.

Copies

The Sergeant at Arms office is available to make copies and scan documents. Due to limited staffing, requests for copying and scanning should generally be limited to situations where at least 50 copies or scans are needed.

Dignitaries

The Senate recognizes that it is customary in many cultures for dignitaries to exchange small gifts upon meeting in their official capacities. If funds are available, the Chief Clerk shall allocate money within the Senate budget to purchase appropriate gifts for this purpose. Any member of the Committee on Senate Organization who receives a visiting dignitary in the Senate or who visits a dignitary on behalf of the Senate may obtain an appropriate gift from the Chief Clerk's office to present to the dignitary on behalf of the Senate. Any other Senator, if assigned by the Committee on Senate Organization to represent the Senate in the context of the visit, may likewise obtain an appropriate gift from the Chief Clerk's office to present to the dignitary on behalf of the Senate. In either case, the cost of the gift is not charged to the Senator's office expense account. In all other cases, a Senator may obtain an appropriate gift from the Chief Clerk's office to present to dignitaries in their capacity as a Senator and the cost of the gifts is charged against the Senator's office expense account.

Disposition of Records

When a Senator leaves office, he or she shall maintain any existing constituent database for use by the incoming Senator, except that the Senator may delete the following:

- Any information that pertains to a constituent case or constituent file contact that had no activity during the current legislative biennium.
- Information contained in any contact note comments marked "private."
- Any documents attached to or associated with a particular constituent case or constituent file.
- Any Internet links associated with a particular constituent case or constituent file.

A Senator may not delete records from a constituent database with intent to circumvent this policy.

Senators who are committee chairpersons shall maintain any electronic versions of official committee hearing notices, records of committee proceedings, and committee reports that are saved within the databases used by the Legislature's committee clerk software. Senators should not destroy these records.

Unless the destruction of a record is prohibited as described above, a departing Senator controls the disposition of the records of his or her office. The Senator should complete the proper form provided by LTSB concerning disposition of electronic records. Generally, a Senator may choose to delete electronic records, transfer them to a successor in office, or delete and receive a copy of the records. For additional information, contact the Chief Clerk or LTSB.

District Office

Rental of space for district offices is permitted with the Chief Clerk's prior approval of the lease agreement. Lease agreements are between the Senator and the lessor. Senators may not rent district offices from themselves, businesses with which they are associated, or members of their immediate family. Senators shall arrange rental agreements for a maximum of the biennium or the duration of their term, whichever is less. The Senate shall pay rent directly to each landlord or provider of services. Rent is charged to the office expense account of the applicable Senator. Liability coverage is provided in accordance with the State Risk Management Self-Insurance Fund.

Door Lettering

Information pertaining to a Senator may be lettered on the door free of charge. Any staff or committee information will be charged to the Senator's office expense account per name. Contact the Sergeant at Arms office for this service.

Flags

Wisconsin state flags and United States of America flags are available through the Chief Clerk's office. Office accounts may be used to purchase a flag for distribution to the public. Checks are payable to the "State of Wisconsin"; no cash payments accepted. At the Senator's request, flags will be flown over the Wisconsin State Capitol, and a certificate will be issued and signed by the Chief Clerk for each flag flown. Contact the Chief Clerk's office or check their website at <http://www.legis.state.wi.us/senate/scc/PDFs/FlagRequestForm.pdf> for the current price of flags.

Furniture and Office Equipment

All furniture and office equipment in use in the Senate, other than storage boxes and other personal property of Senators and staff, is the property of the state. The Chief Clerk maintains an inventory of such furniture, telephones, and facsimile machines. Computer equipment is provided and supported by LTSB. At the beginning of each legislative biennium, the Chief Clerk shall provide each Senator with an itemization of the furniture assigned to the Senator. Each Senator shall acknowledge receipt of the itemization.

Furniture in the Senate was designed for specific offices within the Capitol. As a result, when a Senator moves to a new office, he or she generally receives the furniture located in the new office. All furniture, telephone, computers, and facsimile machine moves must be authorized and coordinated by the Chief Clerk's office. LTSB will coordinate the computer equipment moves with the Chief Clerk's office. At the conclusion of each legislative biennium, the Chief

Clerk shall “true up” the furniture, telephone, and facsimile inventory and note any missing or damaged furniture or equipment.

If funds are available, the Chief Clerk shall allocate a portion of the Senate budget for repairing damaged furniture, telephones, or facsimile machines and purchasing or replacing if necessary.

The Chief Clerk shall allocate a portion of the Senate budget to purchase one storage box per biennium for each Freshman Senator. The cost of any such box is charged against the Senator’s office expense account.

Gifts (Accepting Items From Lobbyists)

Generally, Senate employees may not accept anything of pecuniary value from a lobbyist, a lobbyist’s employee, or a person that employs a lobbyist (principal). There are certain limited exceptions to this policy, consistent with the state’s code of ethics for public officials. Please refer to GAB guidelines for more information which may be found here: <http://gab.wi.gov/guidelines/1201-Standards-of-Conduct-State-Public-Officials>. For any further questions or concerns, contact the Chief Clerk.

Hearing Impaired

The Wisconsin Telecommunications Relay System (WTRS) is a telephone system designed to give persons with hearing and/or speech disabilities “functionally equivalent” access to the telephone network. WTRS relays telephone conversations between persons using a text telephone (TTY) and persons using a conventional telephone through a communication assistant (CA). The CA relays the hearing person’s exact words by typing back to the TTY user. All CAs have been trained to help conversations flow with ease, accuracy, and confidentiality. The FCC has designated 711 exclusively for telecommunications relay service. Simply dial 9+711 and an operator will request the number you are calling and place the call. For additional information, please visit <http://www.wisconsinrelay.com/about.html>.

Sign language interpreters have limited availability. When reasonable notice is provided, the Chief Clerk’s staff will attempt to provide sign language interpreters for legislative hearings and/or constituent meetings. Hearing assistance devices are available in 411 South for committee hearings and all other meetings. Please contact the Senate Sergeant at Arms’ office if use of these devices is needed. Every effort will be made to ensure any committee with hearing impaired members of the public will be moved to 411 South.

Information Technology

Contact LTSB at 7-9528 with all questions or concerns regarding computer software, hardware, and printers. Printer toner, CDs, DVDs, flash drives, and labels are available through the Chief Clerk’s office. These items, with the exception of toner, are charged to the Senator’s office expense account. The Senator’s office expense account may not be used to purchase computers or software, except that the Committee on Senate Organization may approve the purchase of non-standard software if the purchase is a valid state expenditure. The Senate forbids the illegal duplication of licensed software.

If a technical issue arises in a Senator's home and/or district office with legislative supplied hardware or software, the district office should contact LTSB for technical support. LTSB and the office will first attempt to resolve the issue remotely. If the issue cannot be resolved remotely, then the district office, the Chief Clerk's office, and the LTSB will coordinate one of the following options: (1) the Senate district office staff member may bring the affected equipment to LTSB for support; (2) LTSB may visit the district office to provide support; (3) upon rare occasion, LTSB, the district office, and the Chief Clerk's office may agree to contract with a non-legislative service provider to visit the district office to assist with resolution. Any contracts and costs associated with option 3 will be managed by LTSB.

Media Credentialing Process

Using recommendations put forth by the Wisconsin Capitol Correspondents Board and the Senate Sergeant at Arms, a process has been established for members of the media to apply for and obtain professional credentials which will be needed to gain access to the designated press areas in the Senate Chamber.

Members of the media wishing to apply for permanent (full legislative session) or temporary (single day) credentials should utilize the online application feature maintained by the Sergeant's office. Submitting a credential request does not guarantee approval, and the Senate Majority Leader reserves the right to revoke credentials at any time.

If an applicant is denied credentials, he/she has the right to appeal. Written appeals should be submitted to the Sergeant's office, which will then forward the appeal to the Committee on Senate Organization for review.

Seating for credentialed media is available on a first-come, first-serve basis. The Senate Parlor is not available to members of the press while the Senate is in session.

Still camera and video photographers should remain in designated areas. Photos and videos are not to be taken from the vestibule, parlor, or gallery, or any other non-designated press areas.

The full written policy on media credentialing can be found at www.legis.wisconsin.gov/pages/welcomemedia.aspx.

Membership Dues/Registration Fees

At the request of a Senator, the Senate will pay membership dues for the American Legislative Exchange Council (ALEC), National Organization of Black Elected Legislative/Women (NOBEL/WOMEN), Women In Government, and chambers of commerce within the Senator's district. The Senate will pay membership dues for the Chief Clerk, Sergeant at Arms, and their staffs, for membership in their respective professional organizations. The Senate will also pay membership dues for the LHRO staff in their respective professional organizations. All other dues payments on behalf of an individual Senator or staff person are prohibited unless approved by the Committee on Senate Organization as an expense directly related to the affairs of state government. All such payments are charged to the applicable office expense account.

Miscellaneous Expenditures

Any proposed expenditure on behalf of a Senator that is not specifically authorized under Senate policy must be approved by the Committee on Senate Organization as directly related to the affairs of state government prior to payment by the Chief Clerk.

Newspapers, Periodicals, and Other Publications

Senators may subscribe to or purchase newspapers, periodicals and other publications if, in the opinion of the Senator, the purchase is directly related to the affairs of state government. For district-based publications, Senate staff should contact the subscription office directly. For publications outside the district, contact the Chief Clerk's office. All statements for newspapers and periodicals must include the Senator's name. These statements should be sent to the Chief Clerk's office for payment and deduction from the Senator's office expense account.

Major newspapers are available to Senate offices via delivery by the Sergeant at Arms' staff. Senators may authorize subscriptions every January, not to exceed the Senator's term of office. Costs are charged to the Senator's office expense account.

Many major newspapers are available online, including the Milwaukee Journal Sentinel (www.jsonline.com), Wisconsin State Journal/Capitol Times (www.madison.com), Los Angeles Times (www.latimes.com), New York Times (www.nytimes.com), Seattle Times (www.seattletimes.com), and Wall Street Journal (www.wsj.com).

Certain publications, both printed and on-line, require membership or registration in order to subscribe. Costs of such memberships and registrations may be paid from the Senator's office expense account.

Office Walls and Windows

If a Senator desires to hang an item on the walls of his or her office, the Senator must contact the Sergeant's office to facilitate the use of a proper mounting device consistent with policies of the State Capitol and Executive Residence Board. Generally, items are mounted by DOA using the picture rail.

Senate office windows and patios must be kept clear of any obstructions. In addition, nothing may be mounted or affixed to Senate office windows. Any unauthorized material shall be removed and disposed of by the DOA in accordance with Adm 2.07.

Open Records

Custodian

Each Senator is the custodian of the records of his or her office and of the records of any committee of which he or she is the chair. The Chief Clerk is the custodian of the records of his or her office (e.g., personnel, per diem, purchasing, telephone records, travel records, and documents that are part of the permanent historical record of the Senate). Note that when a Senator leaves office prior to the expiration of his or her term, the Senator may choose to allow his or her staff to continue to have access to records of the office. In this situation, after the

Senator leaves office, the leader of his or her party caucus (i.e., Majority or Minority Leader) is the custodian of those records and controls their disposition. See **Records Management** on page 32.

Assistance With the Response

Responding to a records request often requires a complex legal analysis. Offices may contact the Chief Clerk and Legislative Council for assistance whenever a records request is received. For example, the Legislative Council may help an office interpret a request, help determine if redactions may be appropriate, and provide guidance concerning response letters.

The Wisconsin Legislature considers each office the owner of their electronic data. As such, if LTSB receives an *open records request* for data from a legislative office, that request is denied and the requester is referred to the legislative office in question. Please note that LTSB is not authorized to perform *open records request* searches, to make determinations about which search results meet the *open records request*, or to answer legal questions. If you receive an *open records request* and have legal questions, please contact the Senate Chief Clerk's office, the Legislative Council, or seek other legal counsel. LTSB will provide the following *open records request* support upon request:

- a. Identify legislative data sources, with an explanation of the type of data stored in each location.
- b. Provide documentation and one-on-one training on how to search each legislative data source.
- c. Produce data from the email backup system.
- d. Provide email confirmation of which of these services an office has received and when the services were rendered.

An office may invoice the requester for location fees as further described below.

Confidentiality

Pursuant to the holding in *State v. Zien*, Dane County Case No. 05 CV 2896, proposed legislation that has not been introduced may be withheld from public inspection under the public records law as a draft document, regardless of whether the proposed legislation was shared with other individuals or entities. To accomplish the public policy objectives of this exception from disclosure, it is likewise the policy of the Senate that any information that identifies, discusses, or refers to such proposed legislation may be withheld from public inspection.

Pursuant to *Schill v. Wis. Rapids Sch. Dist.*, personal emails and similar documents are not subject to disclosure under the public records law if the content of the email or document is unrelated to public business and the document does not evidence a violation of law or policy.

Hours of Inspection and Fees

Offices are open for business and inspection of records from 9:00 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. Requests for records may be made at any time during

normal business hours. The cost for copying documents is \$.15 per page. In addition, a Senate office may charge the actual, necessary, and direct cost of locating requested documents if the cost exceeds \$50.00. Fees may not be charged for redaction (*Milwaukee Journal Sentinel v. City of Milwaukee*, 2012 WI 65). Prepayment of fees may be required if the total amount exceeds \$5.00 (see s. 19.35 (3) (f), Stats). These fees may be waived.

Opening Prayer for Session

If a Senator would like to arrange for an individual to deliver the opening prayer for session, the Senator shall write a letter to the Senate President indicating the name and address of the individual and the date on which the Senator requests the prayer to be offered. The Senator should provide a copy of the letter to the Chief Clerk. Once the President approves of the request, the President notifies the Chief Clerk and the Senator, and mails the guidelines and parking information. The guidelines shall indicate all of the following:

- That the prayer should be approximately two to three minutes in length.
- In accordance with the United States Supreme Court precedent regarding prayers offered for public functions, that the prayer must be non-denominational, non-sectarian and non-proselytizing.
- That the prayer should not reference Christ, Buddha, Allah, etc., or contain any denominational appeal.
- That the prayer should avoid contentious subject matter and should not be political.

In addition, the President shall notify the individual that parking may be arranged by contacting the Sergeant at Arms 24 hours before the scheduled floor session.

Package Express

Package express services are available. Contact the office of the Sergeant at Arms for additional information. All package express costs are charged to the Senator's office expense account.

If you have a delivery to go on Badger Bus, please contact the Sergeant's office. The Sergeant's office has a complete schedule for Badger Bus and will make sure your package gets on the bus at the appropriate time.

Couriers are often used to deliver the packages to Badger Bus, as there is no longer a bus depot. Couriers will deliver packages at all hours of the business day. All calls for deliveries should be made to the Sergeant's office as their office is the pick-up point for the Senate.

Parking Spaces

Payment for parking is made through a monthly payroll deduction.

Parking spaces allotted to the Senate are distributed as follows:

Office	Spaces Allotted
Majority Leader	5
President	3
Co-Chair of JFC	3
Minority Leader	4
Ranking Minority JFC	3
Senator	2

The Sergeant at Arms office facilitates the process of distributing and reclaiming unused spaces. Each office controls the use of parking spaces allotted to it. If an office will not use all of its allotted spaces, they should notify the Sergeant at Arms immediately. These unused spaces will be made available only to Senators that are not in leadership positions, based upon seniority. The office that initially chose to make the space available may reclaim each unused space at any time.

Photos and Digital Cameras

The Legislature has two photographers available for school groups, meet and greets, press conferences, and any other legislative event in either house of the Legislature. The phone numbers to schedule a photography appointment are 261-9476 and 267-0897. If neither photographer is available, then the Sergeant's office will assist you by either taking the photo for your office or providing your office with a digital camera. Digital cameras may be checked out from the Sergeant's office. The digital camera may be used only for official Senate business. The time period for which an office may check out a digital camera is limited and will be stipulated in the sign-out form. The use of the digital camera and the services of the Sergeant's office to take photos will be administered on a first-come, first-served basis.

Photocopying

The Chief Clerk is responsible for all photocopying equipment. The Sergeant at Arms office maintains the equipment and will assign one account number to each office that can be used on all Senate photocopying equipment. The cost of copies will be charged to the Senator's office expense account. Senate committees are assigned an additional account number. The cost of copies for committee work is not charged to the chairperson's office expense account. Contact the Sergeant at Arms office for special projects that require large numbers of copies.

Poll Lists, Professional Lists, and Other Lists

The office of the Chief Clerk does not house or process list data. The single source for list processing and list data is LTSB. Please make your requests by calling the LTSB Help Desk (267-9528).

Statewide or Multi-District Lists

The Government Accountability Board maintains the Statewide Voter Registration System which is Wisconsin's official list of registered voters. It contains voter id, name, address, county, municipality, ward, year of birth, sex and elections voted. LTSB obtains this list after each election once GAB is prepared to release it. The cost of the list is split between the Senate and Assembly. Once received, LTSB standardizes and geocodes the addresses adding Assembly and Senate districts. Offices may request the raw data or have it added to their Forward database by LTSB for use in the conduct of legislative business.

The Chief Clerk may provide LTSB with funds to purchase other statewide lists commonly used in the Senate for use by all Senators and non-partisan legislative agencies in the conduct of legislative business. Senators may purchase lists applicable to their districts for the purpose of distributing communications that are directly related to the affairs of state government. For any such list, the list's cost is charged to the Senator's office expense account.

If authorized as a valid state expenditure by the Committee on Senate Organization, a Senator may purchase a list that covers more than one district. A copy of any such list shall be retained at LTSB until at least the end of the biennium in which it was purchased.

Polling and Tele-Town Hall Meetings

A Senator may contract to have a telephone poll conducted within the boundaries of his or her Senate district. The Committee on Senate Organization must approve all contracts as valid state expenditures. The statement to be used by the pollsters and questions to be asked must be filed with the Chief Clerk prior to approval of the contract. Costs for such polling shall be charged to the Senator's office expense account. In addition, a Senator may contract to conduct a teleconference town hall meeting within the district, without approval from the Committee on Senate Organization. Costs for conducting a teleconference town hall meeting shall be charged to the Senator's office expense account. However, teleconference town hall meetings and polling by candidates for re-election or election to another office may not be conducted after the candidate is eligible to circulate nomination papers.

Purchasing

All Senate purchases, except lease agreements for district offices, are made through the Chief Clerk's office. Senate purchasing and procurement is governed by s. 16.74, Stats. The Chief Clerk or his or her designee shall sign all necessary contracts and requisitions.

Purchases of less than \$10,000 may be made from any vendor who, in the opinion of the Chief Clerk or the Senator requesting the purchase, is able to supply the requested goods or services in a timely manner.

Purchases of \$10,000 to \$24,999 shall be made only after the Chief Clerk has solicited bid quotes from at least three vendors. The bid quotes may be from published list prices, verbal quotes, or written quotes. Contracts shall be awarded in response to solicitation of bid quotes to the bidder who, in the opinion of the Chief Clerk, is the lowest responsible bidder meeting the specifications. Cost is not the sole determining factor.

Purchases of \$25,000 or more, other than postage, shall be made only after the Committee on Senate Organization, or the chairperson, has approved the purchase and the Chief Clerk has solicited written responses to a request for proposals. Contracts shall be awarded in response to a request for proposals to the bidder who, in the opinion of the Committee on Senate Organization, or the chairperson, is the lowest responsible bidder meeting the specifications. Cost is not the sole determining factor.

Requirements for solicitation of bids or requests for proposals do not apply if the product or service is available from only one source, if the product or service is purchased off of a state contract, an emergency exists such that time would not permit solicitation of bids, substantial time pressure beyond the control of the Chief Clerk exists to obtain the product or service, the purchase is for legal services, or the intrinsic value of the product or service is determined by its historic, artistic, or educational value.

In the case of a good or service that is jointly purchased with the Assembly or another agency, the amount of the total purchase that will be paid by the Senate is the amount that determines which of the above requirements applies.

This policy does not prohibit the Chief Clerk from requesting that a particular purchase be made through the Department of Administration, in which case the Department of Administration would be responsible for following procurement laws that are applicable to executive branch agencies.

Lease agreements for district office space are not subject to the requirements above. They are governed by the **District Office** section on page 20.

Contract Sunshine

Contract Sunshine (s. 16.753, Wis. Stats.) is Wisconsin state government's online database of procurement activity. Because the Act was drafted with Executive Branch procurement in mind, its requirements do not translate precisely with regard to legislative procurement. In consultation with the staff of the Government Accountability Board, the Legislature has outlined the following procedure for complying with Contract Sunshine.

Except as provided below, the Senate Chief Clerk will report each order or contract that involves a single expenditure of \$10,000 or more or, if the contract or order is for continuing purchases, multiple expenditures under the contract that total \$10,000 or more in aggregate during the current fiscal biennium. If bids or proposals are solicited for such purchases, the solicitation for bids or proposals will be reported.

Multiple purchases from a single vendor of less than \$10,000 each are not reportable, unless the purchases total \$10,000 or more in aggregate and are made under a contract or order for

continuing purchases. Purchases of postage from the United States Postal Service and deposits into the Senate's bulk mail account with the United States Postal Service are not reportable. Office rent is not reportable. Payments to the Department of Administration or other state governmental units are not reportable. Cellular phone services purchased from a particular vendor are not reportable, provided each cellular phone account with that vendor is separately maintained (note, though, that if payments on one of those separate accounts totaled \$10,000 or more in a fiscal biennium, then that account's payments would be reportable).

Printing and Communications

Materials to be Directly Related to the Affairs of State Government. All printing and communication designed by the Chief Clerk's office, Senate staff, or at the direction of a Senator, must be directly related to the affairs of state government. The Chief Clerk reviews the content of all printing and other communications that are designed by the Chief Clerk's office in an effort to help ensure compliance with this policy. While the Chief Clerk provides advice in this regard, it is ultimately the responsibility of each Senator to ensure that the content of all printing and communications designed or distributed at his or her request are directly related to the affairs of state government.

The Chief Clerk's office shall provide design and printing services on behalf of Senators only for the following printing and communications, all of which are directly related to the affairs of state government:

- Advertisements for listening sessions or similar meetings to discuss public policy issues, current laws and regulations, or other state government issues.
- Advertisements for educational seminars that are coordinated with executive branch or federal government agencies and at which attendees will learn about a specific regulated activity and the applicable governmental regulations.
- Communications that discuss a Senator's legislative agenda, legislative achievements, constituent service, or legislative office; activities of the Senate; district community activities or information; current laws or regulations; public policy issues under debate; or other state government issues.
- Photographic portraits or other photographs depicting a Senator engaging in Wisconsin legislative activities, activities related to his or her duties as a Senator, or activities in his or her district (provided they are not political campaign-related).
- Maps showing the state or a Senator's district.
- "Saw you in the news," school group photograph templates, and similar items.
- Citations authorized under Senate rules.
- Commemorative resolutions.
- Senate office stationary and like materials.

- Surveys relating to public policy issues, the activities of the Senate, current laws or regulations, other state government issues, or the performance of public officials.

Election Campaign Season Restrictions. The following policies are likewise intended to ensure that Senate printing and communications are not designed or distributed for a political campaign purpose:

- If a Senator is up for reelection and he or she distributes a mass-mailing between January 1 and April 14 of the year of the election inviting individuals to obtain free publications from the Senator (e.g., Blue Books), the mass-mailing must also indicate that, due to restrictions in the election campaign laws, requests made after April 15 should be directed to the Chief Clerk's office. The Chief Clerk shall fulfill such requests without a label or other information identifying the item as being provided by the Senator.
- After the date on which nomination papers may be circulated for a public office, no Senator may distribute a mass-mailing or similar communication within the jurisdiction of that public office that contains the image of, discusses the individual achievements of, or specifically criticizes another individual who holds that public office or who has announced a candidacy for that public office.
- No Senator who becomes a candidate for national, state, or local office may use Senate funds to produce or distribute 50 or more pieces of substantially identical material after the first day for circulation of nomination papers, unless an exception to s. 11.33, Stats., applies. An electronic copy of a document counts as a single copy for the purpose of determining the total distributed. A copy posted to a web page counts as a single copy for purposes of determining the total distributed. Senators who are subject to this limitation may forward requests for free publications to the Chief Clerk's office. The Chief Clerk shall fulfill such requests without a label or other information identifying the item as being provided by the Senator.

Advertisement Communication. A Senator may purchase services to promote listening sessions or similar meetings within the district to discuss public policy issues, current laws and regulations, or other state government issues. Examples of such services include, but are not limited to, the use of telemarketing services, print advertising, etc.

Decorum in Senate Publications. All printing and other communications that are designed or distributed at the request of a Senator must conform to the Senate's rules and customs of debate in the same manner as if the Senate were sitting in session.

Distributions to be Made in District. A Senator may not distribute postal patron mailings outside of his or her district. It is acceptable for a minimal number of copies to be distributed outside the district due to postal routes.

Methods of Distributing Hard Copies. Hard copies of communications may be distributed as follows:

1. By hand by a Senator, the Senator's staff, the staff of another Senator, or volunteers.

2. Via the United States Postal Service, after processing by the Sergeant's staff.
3. Via the United States Postal Service, after processing by an independent contractor, provided the use of the contractor is more cost-effective or timely.
4. Via insert in local publications.

All contracts for distribution shall be arranged via the Chief Clerk's office and are subject to applicable policies concerning procurement. In addition, please see the "Alternative to State Contract Printer or Senate Mail Distribution" policy below.

Office Expense Account. Printing and communications expenses are charged to a Senator's office expense account.

General Printing Procedure. The following procedures are recommended when a Senator requests printing:

1. Notify the Chief Clerk's Print Coordinator of the request for printing.
2. Senate office requests mailing list from LTSB. Determine mail universe (i.e., individual name, residential customer or postal customer). Final list to be sent to mail coordinator (Chuck) and print coordinator (Cindy).
3. Contact a Graphic Designer in the Chief Clerk's office for design layout assistance. Paper costs can vary greatly depending on design layout. Every consideration should be given to using the most economical layout.
4. After the design layout is completed, the Graphic Designer will contact the Print Coordinator for a printing requisition. The printing requisition will include all the necessary information to be approved by the Chief Clerk.
5. Printing time, from requisition to delivery, is an estimated maximum of 13 working days. Re-run orders take approximately 10 working days.
6. The Print Coordinator is responsible for all printing-related correspondence and communication with state contract printers.
7. Senate staff using an outside bid printer must coordinate such efforts with the Print Coordinator. A state purchase order approved by the Chief Clerk must accompany all printing orders with a non-state contract printer. Section 35.05 (5) (e), Stats., provides that no identification of the printer may appear on printed material paid for by the State of Wisconsin. Legislative printing may include the words "union made".
8. If jet spray address labeling is preferred, a request for this service should be submitted to the Print Coordinator when the printing order is placed. At that time, the labeling procedure will be explained.
9. Business cards for staff may be printed on in-house laser printers for a minimal charge to the Senator's office expense account. The Chief Clerk's office has a program for business card design. Contact a Graphic Designer for this service.

Alternative to State Contract Printer or Senate Mail Distribution. All pertinent information must be determined before a valid bid can be obtained from a state contract printer or a non-state

contract printer. The Print Coordinator is responsible for completion of the off-contract printer's bid forms. The bid submitted by an off-contract printer must be the same as, or lower than, the state contract printer, inclusive of fees and charges (i.e., delivery).

In addition, if the print job is for a Senator who is up for reelection and if the print job is to take place in April of an even-numbered year and the distribution will not be coordinated by the Chief Clerk's office, the printer and/or independent contractor processing the distribution must provide the Chief Clerk's office with a letter indicating that the publication will be printed and distributed prior to April 15. If the distribution is via the U.S. Postal Service, an official signed stamped copy of PS Form 3602-R1 shall be provided to the Chief Clerk indicating that the mailing date is no later than April 15.

All forms must be submitted before the Chief Clerk will sign the necessary printing requisition.

Professional Development Coursework

The Senate supports the professional development of Senators and legislative staff. Except as provided below, a Senator or a member of his or her staff may attend classes for purposes of obtaining instruction directly related to the Senator's or staff person's duties or proposed duties in the Senate. The Committee on Senate Organization must approve any such reimbursement or payment in advance of payment by the Chief Clerk, following the process for approval of out-of-district staff travel. The cost of attending such classes is charged to the Senator's office expense account. This policy is intended to permit intermittent professional development coursework and does not permit a Senator or staff person to enroll part-time or full-time in a degree-granting institution.

Receptions

If funds are available, the Chief Clerk shall allocate a portion of the Senate's operating budget for holding an inauguration reception, uniform fallen hero receptions, receptions paid for out of applicable leadership account, and any receptions approved by the Committee on Senate Organization as valid state expenditures. All such receptions shall be held in the Capitol and be open to the public.

Records Management

The records of the Senate, whether held by a Senator or the Chief Clerk, are governed by s. 16.61 (2) (b) 1., Stats. Neither a Senator nor the Chief Clerk is under any duty to preserve any records, except those that are subject to an open records request, an investigation, a litigation hold, or a court order prohibiting their destruction and except those that are otherwise required to be preserved as provided below. The Chief Clerk shall preserve all personnel, per diem, purchasing, and travel records of the Senate for three biennia plus the current session, except that records maintained in the LHRO shall be preserved as required by the Internal Revenue Service. Any other records of the Chief Clerk's office may be destroyed at his or her discretion. The Chief Clerk may contact the Wisconsin Historical Society prior to destruction. For further information, contact the Chief Clerk.

Scholar Program

The Chief Clerk shall administer the Senate Scholar educational internship program. If funds are available, the Chief Clerk shall allocate a portion of the Senate budget to pay for the costs of the program. Otherwise, the Chief Clerk shall assess a tuition fee to cover the major costs of the program. The Senate may assess a reasonable tuition fee not to exceed \$250 to cover a portion of the costs of the program and may seek grant funds and donations to underwrite all or part of the costs of the program. The Senate may pay for other program costs that are not covered by tuition or grant funds.

Senate Space Use

Many Senate spaces are available for use by groups and individuals outside of the Legislature. However, only persons who comply with the application procedures published by the Chief Clerk and administered by the Sergeant at Arms may reserve available Senate space for private use.

A member of the Senate must sponsor any non-government organizations or individual's use of any Senate space. The sponsoring Senator shall be responsible for that group's use of the facility. The Sergeant at Arms shall refer any request for use of Senate space that is not sponsored by a member of the Senate, or for which the sponsor is not going to be present, to the chair of the Committee on Senate Organization and the Minority Leader for review.

A \$50.00 per hour fee will be assessed to non-governmental entities and individuals for reservation and use of the Senate Chamber, Senate Parlor, and meeting spaces for non-legislative events that are held after 5:00 p.m. or on the weekends. The fee is intended to offset the cost of staff time devoted to assisting with the use of these spaces, and to offset the cost of maintenance and repair of the furnishings. The minimum number of hours assessed per reservation is three hours. Prepayment of the minimum fee is required along with a damage deposit of \$500.00. Any fee balance due at the conclusion of the event will be deducted from the damage deposit. Furnishings in Senate spaces shall not be moved to accommodate use by non-governmental entities or individuals.

The days of public availability for the Senate Chamber and Senate meeting spaces are Monday through Friday from 8:00 a.m. through 6:00 p.m., excluding holidays. The Senate Parlor is available Monday through Friday from 8:00 a.m. through 6:00 p.m., and Saturday and Sunday from 8:00 a.m. through 4:00 p.m., excluding holidays.

Chamber

Lighting or special media equipment may not interfere with the decorum of the Senate. Extraordinary lighting in the Senate Chamber for the purposes of taking photographs should be coordinated between the Majority and Minority Leaders. The Senate membership should be afforded a minimum of one week's notice of such lighting. No persons other than members of the chief clerk's staff, members of the staff of the sergeant at arms, members of a senator's staff, and accredited correspondents of the news media may engage in any audio or video recording of the proceedings of the senate without permission of the committee on senate organization. Senators shall be notified of any such permission.

No food or beverage is allowed in the Senate Chamber, with the exception of water for the presiding officer, the Chief Clerk, and his or her staff.

Access to the Senate Chamber floor when the Senate is not in session is limited to individuals accompanied by official Capitol tour guides, legislators, Senate staff, or those authorized to access the floor by the Committee on Senate Organization. Sitting in the chairs in the Senate Chamber is prohibited unless the individual is accompanied by official Capitol tour guides, legislators, Senate staff, or those authorized to access the floor by the Committee on Senate Organization. The Senator, staff, or tour guide shall ensure that backpacks are removed before individuals are allowed to sit in the chairs.

Hearing Rooms

The Sergeant at Arms shall schedule the use of Senate hearing rooms in the following priority:

- Party Caucuses
- Senate Standing Committees
- Senate Select Committees
- Joint Committees
- Senators
- Assembly Standing Committees
- Assembly Special Committees
- Legislative or State Agency Groups
- Groups or individuals sponsored by a Senator
- Representatives to the Assembly

Parlor

The only persons admitted to the Senate Parlor during floor session shall be legislators, staff, constitutional officers, members of Congress, former members of the Senate, and invited guests of the members. No person involved in promoting or defeating legislation shall be invited into the Parlor.

Meetings of the Committee on Senate Organization held in the Parlor are open to the public. The Committee on Senate Organization may preempt any other use of the Senate Parlor. Any Senator may reserve the Parlor if there is no conflict with the Committee on Senate Organization or session.

Vestibule

The only persons admitted to the Senate Vestibule during floor session shall be legislators, staff, representatives of the media, constitutional officers, members of Congress, former members of the Senate, and invited guests of the members. No person involved in promoting or defeating legislation shall be allowed into the Vestibule.

Senate Space Use by the Public

Many Senate spaces are available for use by groups and individuals outside of the Legislature. However, only persons who comply with the application procedures published by the Chief Clerk

and administered by the Sergeant at Arms may reserve a Senate hearing room or other available Senate space for private use.

Senate Space Approval

The approval of the Majority Leader is required for use by any non-government organization or individual outside of the Legislature to reserve the Senate Chamber, Senate Parlor, or other Senate space in the Capitol. The steps below must be followed to request approval:

- A letter of request by the sponsoring Senator must be written to the Majority Leader. This letter should include: who wants to use the Senate Chamber, Senate Parlor, or other Senate space in the Capitol; when they want to use the space; and for what purpose they want to use the space.
- Upon receipt of the letter, the Majority Leader will mark the letter indicating its approval or denial. The Majority Leader must then provide a copy of the marked letter to the Minority Leader, Chief Clerk and Sergeant at Arms. The Chief Clerk/Sergeant at Arms will notify the Senator whether the room request has been approved and make the reservation.
- Allow at least 10 business days to have this process completed.

Smoking Policy

Smoking is prohibited in the Capitol Building and all state-owned buildings.

Stamps

Stamps may be requested from the Chief Clerk's office. The stamp costs are deducted from the Senator's office expense account.

Supplies

The Chief Clerk shall maintain an inventory of office supplies. The Chief Clerk shall make uniform office supplies available to every Senate office but shall permit offices to special order office supplies at the discretion of the Senator. Office supplies may be obtained through the Chief Clerk's office. The cost of supplies is charged to the Senator's office expense account. No office supplies may be reimbursed without prior approval.

Telephone Policy

1. Each Senator may have 4 voice telephone lines and 1 fax line in his or her Capitol office.
2. Long distance calls placed to fulfill Senate responsibilities will be paid by the state.
3. Calls between a Senator's home or place of private employment and his or her Capitol office usually involve legislative business and will be paid for by the state.
4. Return calls will be paid by the state unless the caller knows that such call does not deal with Senate responsibilities.

5. Dial 9 for an outside line, unless you are making a long distance call. Remember: Any state agency or university number requires only 5 digits. Example: 6-2517 (Chief Clerk). 9 should not be used to dial long distance.
6. Dial 8 for an outside line for long distance business calls. Example: 8-1-414-555-1234 (8 + 1 + area code + telephone number). For long distance calls within the 608 area code, dial 8 + telephone number (1 and the area code are not required). A monthly record of these calls is sent to the Chief Clerk by CenturyLink. The Chief Clerk forwards to each Senator a copy of long distance calls made from his or her office.
7. Each Senator may receive upon request a CenturyLink calling card. These cards are issued to the "Legislature-Senate, State of Wisconsin" with a personalized card number assigned to each Senator. The Chief Clerk will forward a copy of all calls made using the calling card to that particular Senator.
8. Senators should review all phone bills for accuracy and/or discrepancies and to note all calls that should be reimbursed to the state (see **Personal Use of Telephones and Cellular Phones**, below).
9. Prior to moving telephone desk sets or changing lines, for telephone repairs, and for the purchase of new or additional equipment, contact the Chief Clerk's office. (Not all telephone jacks are active.)
10. Collect telephone calls should not be accepted. Contact the Chief Clerk if you are receiving such calls.
11. Three teleconference lines are available for use by Senators or employees for legislative teleconferences. The cost to use the line is \$.05 per minute per person and will be charged to the Senator's office expense account. Contact the Sergeant at Arms Office for the access code and host password.

Cellular Phones

The State of Wisconsin has entered into agreements with multiple cellular companies to provide cellular services to state agencies. Contact the Chief Clerk's office for information related to service options. The cost for cellular phone service, as well as any associated equipment, is charged to the office expense account of the applicable Senator. Blackberry/Smartphone devices are available and charged to the office expense accounts. The Legislature has a BES (Blackberry Enterprise Server) which allows the Blackberry to be wireless, making it unnecessary to "sync" the device to receive email/scheduling updates. The server space is limited by the amount of software licenses purchased. Only equipment used for state business may be connected to the Legislatures' BES. A Blackberry device may be assigned to a Senator and/or staff person assigned by the Senator.

Personal Use of Telephones and Cellular Phones

As a benefit of employment, the Senate allows each Senator and employee to engage in limited personal use of state telephones and cellular phones, provided the use does not impinge upon the Senator's or employee's completion of his or her duties and is consistent

with the policies below. In addition to providing a quality work environment for Senators and employees, allowing limited personal use of the telecommunications system will help ensure that employees are proficient in the use of these communication tools.

While using state telephones and cellular phones, a Senator or employee is acting as a representative of the Senate and an employee is acting as a representative of his or her appointing authority. As such, Senators and employees should act accordingly so as not to damage the reputation of the institution. Senators and employees may not use state telephones and cellular phones to communicate under a hidden, false, or alternate identity.

Senators and employees may not use state telephones and cellular phones to promote their personal business interests, engage in discrimination or sexual harassment, engage in political campaign activity, or engage in any unlawful activity.

If personal cellular phone calls or long distance phone calls are made, the applicable Senator shall ensure that the cost of the calls is reimbursed to the state by the end of the third month following the legislative biennium during which the calls were made. As an alternative to reimbursing specific personal calls, a Senator may choose to reimburse a set amount per month, provided the Senator chooses an amount that covers the cost of any personal calls. The reimbursement must be delivered to the Chief Clerk. The Chief Clerk shall not accept cash. The cost of local phone calls of a personal nature, other than cellular phone calls, need not be reimbursed.

Home Telephone, Fax, Computer Connections

Senate business telephone lines may be installed in a Senator's home and/or district office. Appropriate communications equipment (telephone, fax, answering machine, computer, printer) will be provided. Any authorized computer and printer are provided by LTSB. Line costs, DSL, special features, and fax/printer toner cartridges are charged to the Senator's office expense account. If the service is for a mix of state use and anything more than incidental personal use, the Senate will pay 50% of the cost of service. The State Telephone System (STS) or the State Defined Network (SDN) provides long distance service. Senators who use their personal phone lines for state business may be reimbursed for official calls.

There are several options for computer connections to a Senator's home and/or district office. All fees are charged to the Senator's office expense account. Contact the Chief Clerk's office to coordinate installation with LTSB and the provider.

Telephone Books

Senate offices should provide the Chief Clerk's office with a list of telephone directories they wish to obtain. The Chief Clerk's office will make every effort to procure the directories.

Videoconferencing

The Senate has the capability to conduct videoconferences. The Senate Sergeant at Arms office has a list of statewide interactive videoconference sites. A request to use the equipment for committee hearings must be submitted to the Sergeant at Arms two weeks prior to the

videoconference. It is recommended that videoconferences for other purposes be scheduled a minimum of 7 working days in advance.

Web Pages for Senators

The Chief Clerk's office provides custom web site design for any Senator who requests it. The Chief Clerk's office follows the guidelines generally applicable to Senate publications when posting information to custom-designed web pages (see **Printing and Communications** on pages 29-32). Content posted to a Senator's web site must adhere to "Guidelines Regarding Legislator Use of a State-Supported Web Site" (<http://legis.wisconsin.gov/Pages/internetguidelines.aspx>).

Senate staff may have the Chief Clerk's web design staff post new content to their site. Staff may also post content themselves. Staff wishing to post their own content should contact the Chief Clerk's web design staff for assistance.

Note that it is possible to obtain a domain name to use to redirect web users to the Senator's site. The name shall be in the form determined by the Chief Clerk. A domain name and redirector may be paid for out of the Senator's office expense account.

In addition to designing web sites for individual Senators, the Chief Clerk's office shall provide web site design services to the Majority Leader, for purposes of creating a Senate majority web site, and the Minority Leader, for purposes of creating a Senate minority web site. Content may be posted to these web sites only at the direction of the applicable leader's office. The purpose of these web sites is to provide the public with a convenient source of information concerning the Senate majority's and minority's membership, legislative agenda, and legislative activities. The same standards apply with regard to the content of these web sites as apply to other Senate-designed web sites.

IV. Per Diem and Travel

Per Diem and Round-Trip Mileage

Section 13.123 (1) (a) of the Wisconsin Statutes authorizes a legislator to sign an affidavit certifying the necessity of establishing a temporary residence at the State Capitol for the period of any legislative session. It is the policy of the Senate that, for purposes of signing this affidavit, it is necessary to establish a temporary residence at the State Capitol if the legislator's permanent residence is outside of Dane County and the legislator expects to incur occasional or ongoing food and lodging expenses in Madison as a result of performing legislative business during the legislative session. With certain limited exceptions, a legislator who signs such an affidavit may then receive a per diem allowance for each day that he or she is in Madison on legislative business. A legislator may not receive a per diem allowance for Saturdays and Sundays unless the legislator is in actual attendance on such a day at a session of the Legislature or a meeting of a standing committee of which the legislator is a member. For the 2013-14 session, the maximum allowable per diem is \$88 per day.

Alternatively, a legislator may sign an affidavit certifying that it is not necessary to establish a temporary residence at the State Capitol. Such a legislator is then entitled to one-half the maximum per diem allowance.

On floor session days, a legislator must be recorded as present at the session in order to receive a per diem payment for that day.

A Senator may not receive reimbursement of expenses from the state for any day for which the Senator claims per diem, except:

- Mileage, as permitted under the committee travel policy;
- Travel expenses, other than meals and lodging, for travel outside of the district as permitted under the in-state leadership travel policy;
- Travel expenses, other than meals and lodging, for travel outside of the district, incurred with the prior approval of the Committee on Senate Organization; or
- Authorized weekly round-trip travel expenses to and from Madison.

Per diem claim forms should be submitted to the Chief Clerk no later than the last working day of the month. The Chief Clerk will process claim forms as quickly as possible. Forms submitted after the deadline may be delayed. Per diem is processed two to three times each month – typically the first business day of the month and a couple more times throughout the month.

Members whose permanent residence is outside of Dane County may be reimbursed for one round trip per week to and from Madison for any week during which a member claims per diem.

A member of the Senate who wishes to claim reimbursement for a round-trip must so indicate on his or her per diem claim form.

A certificate of mileage must be signed and submitted to the Chief Clerk at the beginning of the biennium, giving the exact round-trip mileage from the Senator's home to the Capitol. A W-4L

form must be completed so that the state comptroller can make a determination with respect to federal withholding requirements at the beginning of the tax year for those who live more than 50 miles from the Capitol building.

Travel Approval

Except as provided below, if a Senator or staff will be traveling outside of the district on business directly related to the affairs of state government, written approval must be obtained in advance of the travel from the Committee on Senate Organization. This requirement applies regardless of whether the travel expenses are paid or reimbursed by the Senate or another individual or entity. Except as provided below, the Senate will not pay or reimburse travel expenses until the Chief Clerk's office receives written approval from the Committee on Senate Organization.

As described below, the approval of the Committee on Senate Organization is often required for Senators and staff to travel. The steps below must be followed to request approval:

- A letter of request must be written to the Chair of the Committee on Senate Organization, with a copy to the Chief Clerk. This letter should include: who is going to be traveling; where are they traveling to; when are they traveling; for what purpose are they traveling; and whether they will be requesting full, partial, or no reimbursement.
- Supporting documentation needs to be sent along with the letter (i.e., conference information, registration materials, agenda, etc.).
- If approved by the Chair, the Chair will forward the letter and supporting documents to the Chief Clerk who will then prepare and circulate ballots to the members of the Committee on Senate Organization. When the ballots are returned, the Senator will be notified whether his or her travel request has been approved.
- Allow at least 10 business days to have this process completed.

Leadership Travel

The Majority Leader, Minority Leader, and any member of leadership designated by the Majority or Minority Leader may travel within the state outside of their respective districts on business directly related to the affairs of state government without separate approval of the Committee on Senate Organization and may obtain reimbursement for such travel. In the case of a member of leadership other than the Majority or Minority Leader, the member shall submit to the Chief Clerk a letter from the appropriate leader approving the reimbursement.

Reimbursement by the Senate is not permitted for travel within the jurisdiction of any office which the Leader or designated Senator seeks beginning on the first day for circulation of nomination papers for that office, unless, in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously received. A Senator may not receive reimbursement on a day for which the Senator claims per diem, except as permitted under the per diem and round trip mileage policy below. In addition, the Majority

Leader and Minority Leader may authorize their staff to travel within the state outside of their respective districts without separate approval of the Committee on Senate Organization (see **Staff Travel** on page 44).

Travel Accounting and Reimbursement

To obtain authorized reimbursement for travel expenses incurred while on state business, Senators and staff must file a travel voucher with the Chief Clerk's office. To facilitate quicker reimbursement, separate travel vouchers are required for all out-of-state travel. Reimbursement can be made only for actual and necessary expenses. Those actual and necessary expenses will be reimbursed up to the maximum amounts established by the Office of State Employment Relations (OSER).

The Chief Clerk's office maintains records of individual Senator's per diem and travel voucher reimbursements for tax purposes. Travel approved by the Committee on Senate Organization is charged to the Senator's office expense account. Authorized travel by the Majority Leader, Minority Leader, or other member of leadership within the state outside of their respective districts on business directly related to the affairs of state government may be charged to the Senator's office expense account or the appropriate leadership account, as directed by the Senator. If out-of-state or out-of-district travel is not pre-approved by the Committee on Senate Organization, the claimant will not be reimbursed for the expenses, except in the case of the Majority Leader, Minority Leader, or other member of leadership. No retroactive request for reimbursement is allowed.

Senator Travel

Travel During Floor Session

All travel approval (except staff travel) is contingent upon the Senate not being in session. Travel must commence after adjournment of the session and end prior to the reconvening of the Senate. In the situation where a special or extraordinary session is called after travel has commenced, all efforts must be made to return prior to the convening of session. In such a case, the Senate will reimburse travel expenses to return prior to the convening of session only if the travel is out-of-state and was approved by the Committee on Senate Organization prior to the Senator's departure.

If a Senator fails to return from authorized travel during a scheduled session, expenses are not reimbursable for the time the Senate is in session.

In-District Travel

A Senator may travel to in-district meetings, conferences, events, etc. if, in the Senator's discretion, the travel is directly related to the affairs of state government. This policy does not permit attendance at professional development classes or seminars. "In-district" means any portion of a county that is part of a Senator's district and an area not to exceed 40 miles from those county boundaries. Separate approval by the Committee on Senate Organization is not required for reimbursement under this policy. Reimbursement is for actual and necessary

expenses and is charged to the Senator's office expense account. A Senator may not receive reimbursement from the Senate for in-district travel for a day for which the Senator claims per diem. In addition, reimbursement from the Senate for in-district travel is not permitted for a Senator beginning on the first day for circulation of nomination papers for any office with jurisdiction over all or part of the Senator's district, unless in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously obtained.

Other Travel

Except as provided below, a Senator may receive reimbursement for actual and necessary expenses incurred for out-of-state travel and in-state travel (other than in-district travel) only if the travel is authorized by the Committee on Senate Organization as directly related to the affairs of state government. The request for reimbursement must be made to the Committee on Senate Organization prior to the date of the travel, and must be accompanied by supporting documentation evidencing the benefit to the State of Wisconsin and/or the Senate. The Committee on Senate Organization may refuse to authorize travel if supporting documentation is insufficient.

A Senator cannot receive reimbursement from the Senate if expenses are paid by an individual or by an entity other than the Senate. If an honorarium is received and the Senate pays expenses, the honorarium must be given to the Senate. Honoraria and expenses paid by individuals or entities other than the Senate are required by the state GAB to be reported in writing or on the Statement of Economic Interest. A Senator may not receive reimbursement on a day for which the Senator claims per diem, except as permitted under the per diem and round-trip mileage policy below.

Announced candidates for office are not eligible for in-state travel expense reimbursement within the district of the office the Senator seeks, unless, in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously obtained. Reimbursements for in-state and out-of-state travel that are paid by the Senate are charged to the Senator's office expense account. Air travel may be coordinated by the Chief Clerk's office. Every effort should be made to obtain the lowest possible airfare.

In-state, out-of-district travel expenses for the Majority Leader, Minority Leader, and other members of leadership may be reimbursed without prior approval of the Committee on Senate Organization as described in the in-state leadership travel policy.

Standing Approval to Attend Certain Meetings

A Senator's appointment by the Senate, the Governor, or pursuant to statute to a committee, board, commission, task force, etc., provides approval for attendance at official meetings and reimbursement of actual and necessary expenses. The Senator shall attach to the completed travel voucher a letter, copy of agenda, or other official documentation describing the activity

for which reimbursement is claimed. (See **Committee Meetings Out of Capitol** policy for standing committee travel approval.) Reimbursement is not charged to Senator's office account.

Lame Duck Travel

Pursuant to s. 13.123 (3) (b) 1., Stats., provides, in pertinent part: no member of the Legislature may be reimbursed for attendance at any meeting held outside this state, other than a meeting of the Legislature, a legislative committee, committee of the Joint Legislative Council or a statutory body of which the person is a duly constituted member, after the Chief Clerk of the member's house determines one of the following:

- After the day of the August primary, that the member either has not filed nomination papers for reelection or election to another legislative seat or has sought a party nomination for a legislative seat but it is generally acknowledged that the member has not won nomination.
- After the day of the general election, that it is generally acknowledged that the member has not been elected to a legislative seat for the succeeding session.

In making the determination under subd. 1., the Chief Clerk is bound by the determination of the chairperson of the GAB or the chairperson's designee if such determination has been issued.

Committee Travel

Committee Meetings in Madison

Except as provided below, all committee meetings must be held in the Capitol or in legislative service agency facilities. All available state facilities within walking distance of the Capitol are to be used before any other facility may be used for committee meetings in the City of Madison. Prior approval by the Committee on Senate Organization must be obtained before any other space may be used. Approval of committee meetings in Madison is contingent upon the Senate not being in session. Expenses are not reimbursable during the time the Senate is in session.

Committee Meetings Out of Capitol

Senate committee chairpersons must receive prior approval by the Committee on Senate Organization for any committee activity out of the Capitol or legislative service agency facility. This approval must be obtained before notice of the meeting is published. A minimum of five business days should be allowed. Contact the Sergeant at Arms before scheduling the meeting. Room rental fees, reimbursement of actual and necessary expenses, and mileage should be included in the request to the Committee on Senate Organization for out of Madison meetings. It may also be necessary to request the use of a non-standard room set-up (see below). Use of state aircraft, if desired, must be included in the committee chairperson's request. Travel expenses for committee meetings out of Madison are not charged to the chairperson's office expense account. A committee member who is in Madison on legislative business and attends an authorized committee meeting outside of Madison may receive reimbursement for mileage between Madison and the committee meeting and still claim that day as a per diem day. If

meals or lodging are provided to a committee member by the state on a per diem day, the member shall reimburse the state the cost of the meal or lodging.

Approved committee meetings outside of the Capitol or legislative service agency facilities must conform to the decorum of the Senate. The Sergeant at Arms shall ensure that set-up of the facilities conforms to the out-of-Madison committee hearing standards established by the Chief Clerk's office. The set-up shall utilize standard Senate equipment, signage, and furnishings to the maximum extent possible.

A chairperson may be accompanied by no more than one of his or her staff people. In extraordinary situations, the Committee on Senate Organization may authorize additional staff of committee members to attend. The messengers assigned to the committee meeting by the Sergeant at Arms shall also attend. (See the **Transportation** reimbursement policy regarding the necessity to use a state-owned vehicle on page 46.) At the discretion of the Sergeant at Arms, additional members of the Sergeant's personnel may staff hearings.

Staff Travel

In-District Travel

A Senator's staff person may travel to in-district meetings, conferences, events, etc. or may travel to and from the Capitol if, in the Senator's discretion, the travel is directly related to the affairs of state government. This policy does not permit attendance at professional development classes or seminars. "In-district" means any portion of a county that is a part of a Senator's district and an area not to exceed 40 miles from those county boundaries. Reimbursement is for actual and necessary expenses and is charged to the Senator's office expense account. Separate approval of the Committee on Senate Organization is not required for reimbursement under this policy. This policy does not authorize reimbursement for the ongoing commuting expenses of a Senator's staff member. In addition, reimbursement for in-district travel is not permitted for a Senator's staff beginning on the first day for circulation of nomination papers for any office with jurisdiction over all or part of the Senator's district, unless, in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously obtained.

In-State Travel

Travel in state, other than in-district, is permitted for staff with the prior approval of the Committee on Senate Organization. Approval for reimbursement shall be limited to issue seminars and meetings directly related to the Senator's district and/or the Senator's committee assignments, conferences, and professional development seminars. Reimbursement is for actual and necessary expenses and is charged to the Senator's office expense account.

Out-of-State Travel

Travel for official business out-of-state is permissible for staff with the prior approval of the Committee on Senate Organization. Senate staff is permitted to attend only meetings,

conferences, or professional development seminars designed specifically for staff. A staff member may not attend a policy conference on behalf of a Senator, unless the staff member will not be seeking reimbursement for any expenses. Reimbursement is for actual and necessary expenses and is charged to the Senator's office expense account.

Air travel may be coordinated by the Chief Clerk's office. Every effort should be made to obtain the lowest possible airfare.

Leadership Staff Travel

The Majority and Minority Leader may each assign members of their staff to engage in in-state travel, outside of their respective districts for purposes of attending committee hearings or legislative events and legislative activities specific to Senators. Prior to any staff member engaging in travel under this policy, the Majority or Minority Leader shall provide the Chief Clerk with a letter specifically authorizing the travel as directly related to the affairs of state government and directing the manner in which reimbursements are to be assessed pursuant to this policy. Any staff member engaging in such travel may not attend political campaign events or engage in political campaign activities while traveling. Reimbursement is not permitted for travel within the jurisdiction of any office which the Leader seeks beginning on the first day for circulation of nomination papers for that office, unless, in the Leader's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously received. A staff member who engages in travel under this policy may receive reimbursement for actual and necessary expenses of the travel. Reimbursements paid under this policy are charged to the office expense or leadership account of the Majority or Minority Leader or the office expense account of the requesting Senator.

Reimbursement

Travel Expenses for Caucus Meetings

Senators-Elect may be reimbursed for actual and necessary expenses incurred as the result of attending respective caucus organizational meetings prior to being administered the oath of office.

Frequent Flyer Information

If the frequent flyer miles that form the basis for a flight award were earned by an individual in large part while flying on state time and/or state expense, the benefit of the award shall be to the State of Wisconsin, not to the individual. However, if the accrued miles are incidental to the total necessary for the issuance of a flight award, the individual may retain the award.

Lodging

The maximum amount for in-state lodging is the current rate of reimbursement authorized under the state compensation plan. Maximum lodging allowances for out-of-state travel will be based on the most current listing of the Runzheimer Meal-Lodging Cost Index. (A copy of the latest listing is available through the Chief Clerk's office.) Lodging fees may exceed the maximum

if it is a conference site hotel, or if lodging at the maximum amount is not available and an explanation of the higher rate is provided. All claims for lodging submitted on a travel voucher must be accompanied by a receipt. Senators and staff will be reimbursed for lodging at the single rate only.

Senators and/or staff traveling on legislative business are exempt from Wisconsin state sales or use taxes on their motel or hotel lodging, when the sale is properly documented as sold to the state or any agency or instrumentality thereof. Contact the Chief Clerk's office for a wallet-size card documenting this policy for hotel management.

Luggage Fees

Airlines have begun charging a fee for checked baggage. This is a reimbursable expense. However, the number of bags checked must be reasonable for the purpose of the trip. Employees must provide receipts to document the cost of the checked bags. If business travel is combined with vacation/personal travel, the reimbursable expense for the additional checked bags must relate to the number of bags necessary for the business portion of the trip and not the vacation/personal portion of the trip.

Meals

The maximum allowable in-state amounts that can be reimbursed for meals (including tax and tips) are as follows: breakfast \$8.00; lunch \$9.00; dinner \$17.00. The maximum allowable out-of-state amounts that can be reimbursed for meals (including tax and tips) are as follows: breakfast \$10.00; lunch \$10.00; dinner \$20.00.

Senators and staff may spend the meal allowance in the manner they choose for two or more consecutive meals in a day, provided the total reimbursement claim does not exceed the individual meal rates for that day. The maximum allowable tip is 15% of the meal cost and is included in the state maximum allowable meal amounts listed in this section. An individual can claim breakfast if he or she leaves home before 6:00 a.m., lunch if he or she leaves home before 10:30 a.m. and returns after 2:30 p.m., and dinner if he or she returns after 7:00 p.m.

Porter Expenses and Hotel Gratuities

Gratuities to hotel employees may not exceed \$2.00 per day of arrival, \$2.00 per day of departure, plus \$2.00 per night per hotel stay. Porter costs at airports or bus terminals are \$1.00 per piece of luggage.

Transportation

Individuals using privately owned automobiles and motorcycles for authorized travel may be reimbursed at the current rate of reimbursement authorized under the state compensation plan. The Senate requires the use of state-owned vehicles for all in-state travel by centralized Senate staff originating from Madison. Only centralized Senate staff may use state-owned vehicles. When a state-owned vehicle is available, but such an employee opts to drive his or her privately owned vehicle, the mileage allowance shall be at the current state "turndown rate", which, effective 12/1/08, is \$.365 per mile. The "turndown rate" does not apply to Senators, non-

centralized Senate staff, or centralized Senate staff whose travel originates from a location outside of Madison.

Persons using other forms of transportation for authorized travel will be reimbursed for actual and necessary expenses when those claims are submitted on a travel voucher accompanied by a receipt. Reimbursement for commercial air travel is limited to the lowest appropriate airfare. Air travel may be coordinated by the Chief Clerk's office, or the travel agency may bill the Chief Clerk's office directly. Use of private aircraft must be coordinated by the Chief Clerk's office and approved by the Committee on Senate Organization.

Use of privately owned automobiles or motorcycles for travel of great distance will be reimbursed at the lowest airfare available, or mileage at the applicable reimbursement rate, whichever is less.

When renting a vehicle in the United States, use the state contract vendor, whose rate includes free collision and liability insurance. If the state contract vendor is unable to provide a vehicle as needed and another domestic vehicle rental vendor is used, the collision damage waiver (CDW) and liability insurance must be purchased. Contact the Chief Clerk's office for additional vehicle rental information. The Committee on Senate Organization must approve vehicle rental requests prior to travel.

Receipts are required for one-way fares exceeding \$25.00.

Travel Voucher Instructions

The travel voucher is available on the Chief Clerk's website at <http://www.legis.state.wi.us/senate/scc/Travel-Voucher-July-2012.xlsx>. The Chief Clerk's office will update this document if any information should change during the course of the year (i.e., mileage reimbursement rate).

The travel voucher should be completed directly in Excel. This travel form is required for Senate reimbursement processing. By filling out the required information within the cells, the document will calculate totals automatically. The Chief Clerk's office verifies this information, including calculations, before processing payment of travel. As soon as you open the voucher, press "file, save as" and store it as something else (i.e., name_01travel) (01 being January). Do not store over the original document.

Follow the steps below to complete your travel voucher.

1. Note the appropriate month and year in cell B2.
2. List the date (or dates) of the travel in column A.
3. Explain the purpose of the trip; be as specific as possible in column B.
4. List departure site and destination, and return travel in columns C and D.
5. If requesting meal reimbursement, list departure and return times in columns E and F.

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The Chief Clerk's office is not authorized to correct errors on submitted travel vouchers. If an error is discovered, the individual will be notified and the voucher will be returned for correction. All corrections must be initialed by the individual submitting the voucher. Alternatively, the individual may complete, sign, and submit a new voucher. Note that errors will likely delay the receipt of any reimbursement. Senators and staff are advised to contact the Chief Clerk's office in advance for assistance in completing the travel voucher.

V. Appendix ~ Job Classifications

Senate Chief Clerk and Director of Operations

Class Description

Definition: This is a nonpartisan, executive level position. The employee in this class performs highly responsible administrative and professional duties in providing a wide range of services to members of the Senate. This position directs and administers the personnel, purchasing, accounting, facilities management, and general business functions of the Senate. This position is also the parliamentarian of the Senate.

Examples of work performed: Oversees inventory and purchasing of all materials and supplies necessary for the legislative session; determines the type and quality of equipment and supplies as necessary; administers personnel policies as outlined by statutes, rules, and Senate policy; provides advice to Senate leadership; supervises the operation of the office of the Sergeant at Arms; oversees the accounting functions of the Senate to include payroll, authorization of all vouchers, and balancing of accounts; superintends the recording of the daily journal, the engrossing and enrolling of bills, resolutions, etc.; serves as custodian of records of his or her office; announces the business before the house in the order in which it is to be acted upon; and performs any other functions as indicated in the Senate Rules.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of legislative organization and processes; thorough knowledge of the rules and procedures of the Senate; the ability to administer; and the ability to provide consultation to legislators on complex procedural matters, budgetary and personnel matters, and matters impacting the institution of the Senate.

Training and experience: A Juris Doctorate degree from an accredited college or university and four years of professional management or public information experience, or an equivalent combination of training and experience.

Assistant Chief Clerk

Class Description

Definition: This nonpartisan position is required to perform very responsible work providing administrative support to the members of the Senate. The position allocated to this class directs, coordinates, and performs the personnel, purchasing, accounting and general business functions for the Senate. In addition, the Assistant Chief Clerk is responsible for performing the functions of the Chief Clerk (other than providing legal advice) in his or her absence and on the first day of the legislative session. Responsibilities of this position are typically difficult and are performed under the general direction of the Chief Clerk.

Examples of work performed: Requisitions all materials and supplies necessary for the legislative session; oversees the keeping and preparation of the journal of each day's proceedings; makes decisions on what goes into the journal in questionable situations; oversees the custody of the

official records of the Senate; and provides supervision for the journal and legislative records section.

Qualifications

Required knowledge, skills, and abilities: Considerable knowledge of legislative organization and processes; considerable knowledge of the rules and procedures of the Senate and Legislature; thorough knowledge of the principles and practices of business management, especially as they pertain to personnel, procurement, office management, and accounting and budgetary controls; and, the ability to provide consultation to legislators on procedural matters.

Training and experience: Graduation from an accredited college or university and two years of relevant office management experience, or an equivalent combination of training and experience.

Business Manager/Assistant Business Manager

Class Description

Definition: This is a nonpartisan, management level position within the Chief Clerk's office. Work is performed under the direction of the Senate Chief Clerk and Director of Operations.

Examples of work performed: Processing all bill payments; managing projects assigned by the Chief Clerk and Director of Operations; assisting in preparation of Senate budget documents; advising the Chief Clerk and Director of Operations concerning the day-to-day functioning of the Chief Clerk's office; and backing up the processing of all per diem claims, mileage and travel reimbursements.

Qualifications

Required knowledge, skills, and abilities: This position requires strong organizational and communications skills, an ability to work independently and manage multiple projects simultaneously; a strong aptitude with computers and technology; and the ability to understand basic accounting principles.

Training and experience: Graduation from an accredited college or university and six years of office experience, intimate knowledge concerning the operation of a legislative clerk's office, or an equivalent combination of training and experience.

Graphic Designer

Class Description

Definition: This is a nonpartisan position within the Chief Clerk's office providing full performance graphic design work. Employees possess considerable knowledge in the area of commercial art.

Examples of work performed: Spends the majority of time completing projects requiring the creation of original artwork through the use of traditional graphic design tools or electronic imaging. Confers with client regarding such issues as project budget, client objectives, target audience, and background information. Conceptualizes and presents layouts for client approval.

Acts as resource to clients providing information about graphic design techniques and printing production procedures. May act as a liaison between client, vendors, photographers, and the like to complete the production process. May mark up and approve printer proofs or prepress films and attend press checks. Solves problems relating to production. May specialize in a particular field, medium, or technique. Work is performed under general supervision of the Chief Clerk and Director of Operations.

Qualifications

Required knowledge, skills, and abilities: The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

Sergeant at Arms

Class Description

Definition: Employees in this class perform highly responsible administrative and ceremonial duties in providing a variety of services to members of the Senate under the direction of the Chief Clerk. This is a nonpartisan position.

Examples of work performed: Execute all orders of the Senate or its presiding officer connected with the order of the body; exercise supervision over the ingress and egress of all persons to and from the Senate Chamber; travel in-state with Senate committees; see that messages are promptly executed; supervise the Sergeant's staff; maintain basic security throughout the Senate; handle all keys, access cards and photo identification cards for Senate staff; administer parking for the Senate; handle all personnel issues for Sergeant at Arms' staff; provide bulk printing services to the Senate; oversee the day to day functions of the legislative mailroom; and perform all other duties as indicated by the Senate Rules or assigned by the Chief Clerk.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of legislative organization and processes; thorough knowledge of the legislative rules and procedures; ability to direct the work of a support staff; and the ability to provide consultation to legislators on ministerial matters.

Training and experience: Graduation from an accredited college or university, or an equivalent combination of training and experience.

Assistant Sergeant at Arms

Class Description

Definition: This is a nonpartisan position. The employee provides responsible administrative support work in the Sergeant at Arms' office. The work is performed under the general supervision of the Sergeant at Arms or Assistant Sergeant at Arms.

Examples of work performed: Serve as office manager of the Sergeant at Arms' central office; contact point for all errands from Senate offices and legislative agencies; handle all office inquiries and public contacts for information; maintain parking records; maintain keys and access card records; maintain all time sheets and other related documents; maintain Sergeant at Arms' manuals for both the Senate offices and employees of the Sergeant at Arms' office; direct delivery of documents for distribution both to the Senate offices and on the floor of the Senate; supervises the Sergeant's staff; and provides assistance to the Sergeant at Arms.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of legislative organization and processes; thorough knowledge of the legislative rules and procedures; and ability to direct the work of a support staff.

Training and experience: Graduation from an accredited college or university and one year of pertinent work experience, or an equivalent combination of training and experience.

Deputy Sergeant at Arms

Class Description

Definition: This is a nonpartisan position. The employee provides responsible administrative support work in the Sergeant at Arms' office. The work is performed under the general supervision of the Sergeant at Arms or Assistant Sergeant at Arms.

Examples of work performed: Coordinates use of all Senate hearing rooms, Senate Chamber, and Senate Parlor; contact for Senate and Joint committee hearings; assists in Sergeant at Arms' central office; handles legislative printing of Senate photography; assists with bulk mailings; handles all audio-visual and telecommunications usage; handles work orders; handles all printer usage and ordering; supervises the Sergeant's staff; provides assistance to the Sergeant at Arms.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of legislative organization and processes; thorough knowledge of the legislative rules and procedures; and ability to direct the work of a support staff.

Training and experience: Graduation from an accredited college or university and one year of pertinent work experience, or an equivalent combination of training and experience.

Administrative Officer

Class Description

Definition: This is the highest promotional level for personal staff of the President, Majority Leader, and Minority Leader. This position plans, organizes, and supervises the work of technical, semi-professional, and professional staff in the office of the President, Majority Leader, or Minority Leader.

Examples of work performed: This position acts as a liaison between his or her appointing authority, the Legislature as a whole, and other parts of state government. This position

develops and installs administrative procedures within the office of his or her appointing authority and evaluates their efficiency and effectiveness. This position meets with all levels of legislative leadership and staff to develop the legislative program. This position works closely with the Senate Chief Clerk and Director of Operations on all operational and organizational matters.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of the principles and practices of Senate procedures and public administration. Considerable knowledge of the principles and practices of governmental budgeting, accounting, personnel administration, modern office management, and public relations. Strong written and verbal communication skills. Ability to establish and maintain effective working relationships with fellow employees, administrative officials, and legislators.

Training and experience: Graduation from an accredited college or university and one year of managerial experience, or advanced level professional experience which provides reasonable assurance that the skills and knowledge required upon appointment have been acquired and that any additional skills and knowledge required at the full performance level can be acquired within a reasonable period of time.

Legislative Training Officer

Class Description

Definition: This is a nonpartisan, management level position within the office of the Sergeant at Arms. Work is performed under the direction of the Sergeant at Arms.

Examples of work performed: Direct supervision of all Senate messengers; creating, coordinating, and delivering training and orientation for employees of the Sergeant at Arms' office; administering the Senate Scholar Program; coordinating other training and educational activities within the Wisconsin State Senate.

This position develops, promotes, conducts, implements, and evaluates the training and orientation program for employees of the Sergeant at Arms. It is the responsibility of this position to exemplify for new employees the values of public service and respect for the state Senate as an institution of representative government, as well as to teach new employees the skills necessary to adequately perform their duties within the Sergeant at Arms' office. This position also develops broader training and professional development initiatives with the state Senate, under the direction of the Senate Sergeant at Arms and the Senate Chief Clerk and Director of Operations. This position utilizes multiple methods of content delivery, including publication of bulletins and manuals, classroom instruction, and the use of technology to deliver educational information on-demand to Senate staff and Senators.

The supervisory function of this position involves close supervision of approximately 5 full-time messengers as well as approximately 15 to 20 part-time messengers. This supervision involves work assignments as well as supervision of all other facets of work performance. The supervisor

is involved in employment decisions related to hiring, performance evaluation, and, where necessary, discipline and termination within the Sergeant at Arms' office.

Qualifications

Required knowledge, skills, and abilities: This position requires strong supervisory skills, as well as exceptional oral and written communication, interpersonal, and teaching skills.

Training and experience: Graduation from an accredited college or university. Three years of experience in professional development or a related field is desired, although relevant educational experience can be substituted. Knowledge of human resource development theory and practices is desired.

Records and Forms Management Specialist

Class Description

Definition: This nonpartisan position implements the records and forms management policies of the Chief Clerk's office, assists in numerous business operations of the Senate, and has primary responsibility for processing all per diem claims and mileage and travel reimbursements. This position leads and participates in work groups to analyze and document business needs to develop appropriate systems for data collection, retention, retrieval, and access; advises the Senate Chief Clerk and Director of Operations concerning the status of the office's forms and records policies and makes recommendations and improvements in the office's forms and records policies and procedures; manages all filings within the Chief Clerk's office; develops and maintains a map describing the location of all office records and forms; under the direction of the Senate Chief Clerk and Director of Operations, coordinates all responses to requests for records made pursuant to the Wisconsin Public Records Law; advises the Senate Chief Clerk and Director of Operations concerning the action of the Public Records Board and how they may impact the policies of the Chief Clerk's office; and performs such other tasks as assigned by the Senate Chief Clerk and Director of Operations.

Qualifications

Required knowledge, skills, and abilities: Ability to learn quickly and work independently; strong analytical and written communication skills; intimate knowledge concerning the operations of a legislative clerk's office; and strong interpersonal skills.

Training and experience: Graduation from an accredited college or university and two years of experience within a legislative clerk's office, or an equivalent combination of training and experience.

Legislative Assistant I

Class Description

Definition: This is a training level entry into the Legislative Assistant 2 classification. Work is performed under close supervision.

Examples of work performed: May respond to constituent mail; prepare research studies and reports; and formulate press releases.

Qualifications

Required knowledge, skills, and abilities: Knowledge of legislative processes; ability to communicate orally and in writing; and the ability to relate to people in a friendly and intelligent manner.

Training and experience: Graduation from high school, or an equivalent combination of training and experience.

Legislative Assistant II

Class Description

Definition: This is responsible work providing research support to Senators, or a Senate committee and its chair. Positions allocated to this class perform both primary and secondary research on legislation. Positions in this classification are under the direct supervision of a Senator, committee chair, or senior staff member.

Examples of work performed: Researches and develops legislation upon request; consults and advises legislators on pending issues; maintains liaison with all parties having input and concerns into pending legislation; may respond to constituent mail; may prepare research studies and reports on major issues; and may formulate press releases.

Qualifications

Required knowledge, skills, and abilities: Some knowledge of legislative procedures and processes especially as they relate to the functions performed; knowledge of research methods and the manner in which conclusions and recommendations can be formulated; ability to communicate one's thoughts both orally and in writing; and the ability to relate to people in a friendly and intelligent manner.

Training and experience: Graduation from an accredited college or university, or an equivalent combination of training and experience.

Legislative Assistant III

Class Description

Definition: This is very responsible administrative support work for Senators and Senate committees. Positions allocated to this class are responsible for the smooth and efficient operation of the applicable office, responding to constituent work, public information activities, and performing research on proposed legislation. Work is performed under the general supervision of the appointing authority.

Examples of work performed: Responds to constituent concerns and inquiries by providing information gained through research or contact with agency or other personnel; drafts position papers and news releases as directed; researches status of pending and past legislation in order to respond to inquiries regarding these matters; attends hearings to determine arguments for

and against pending issues; and researches, analyzes, and prepares position papers on major issues pending before the Legislature.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of the legislative process, procedures, and policies; ability to efficiently and effectively deal with the public both orally and in writing; the ability to conduct research investigations of both a primary and secondary nature; and the ability to draw conclusions and make recommendations resulting from the research.

Training and experience: Graduation from an accredited college or university and three years of relevant office experience, or an equivalent combination of training and experience.

Legislative Assistant IV

Class Description

Definition: This is highly responsible administrative assistant work in the office of a Senator or Senate committee, the Senate Chief Clerk and Director of Operations, or the Senate Sergeant at Arms. The position allocated to this class is responsible for a variety of public information, constituent relations, legislative liaison, personnel-related, and general office functions for which the appointing authority is responsible. Responsibilities of this position are typically varied and complex, requiring an awareness of the effect of a decision on the legislative process. Work is performed with little supervision by the appointing authority.

Examples of work performed: Researches and formulates legislative proposals for introduction; researches pending legislation; drafts responses to letters from constituents and other interested citizens regarding pending legislation or problems related to government; serves as liaison between appointing authority and members of the Legislature, lobbyists, state agency personnel, the executive office, news media, and legislative service agencies for the purpose of gaining or disseminating information on legislative business.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of the processes and procedures of the Legislature; thorough knowledge of the inter-relationship between the various committees and policy bodies of which the Senate is a member; ability to evaluate information and data and project its logical conclusion; ability to efficiently and effectively deal with the public both orally and in writing; and the ability to conduct research investigations involving the use of research methodology.

Training and experience: Graduation from an accredited college or university and six years of office experience, or an equivalent combination of training and experience.

Human Resources Manager

Class Description

Definition: This is a highly responsible nonpartisan position under the direction of the Chief Clerk. The person in this position manages the human resources functions of the Senate.

Responsibilities of this position are varied and complex. Work is performed with little supervision by the Chief Clerk. This position oversees a staff of payroll officers.

Qualifications

Masters degree or other post-graduate degree from an accredited college or university and two years of human resources experience, preferably within the Legislature, or an equivalent combination of training and experience. Knowledge of human resources principles and laws is essential.

Executive Assistant I

Class Description

Definition: This is highly responsible administrative assistant work in the office of a Senator, the Senate Chief Clerk and Director of Operations, or the Senate Sergeant at Arms. The position allocated to this class is responsible for a variety of public information, constituent relations, legislative liaison, personnel-related and general office functions for which the appointing authority is responsible. Responsibilities of this position are typically varied and complex, requiring an awareness of the effect of a decision on the legislative process. Work is performed with little supervision by the appointing authority.

Qualifications

Training and experience: Graduation from an accredited college or university and two years of office experience at the Legislative Assistant II level, or an equivalent combination of training and experience.

Executive Assistant II

Class Description

Definition: This is the highest promotional level for Executive Assistants and an entry level for more experienced personnel.

Qualifications

Training and experience: Graduation from an accredited college or university and three years of office experience, of which one year must be at the Legislative Assistant IV level, or an equivalent combination of training and experience.

Director of Communications

Class Description

This classification is a professional position which functions as the director of communications for the Senate Majority Leader's office or Senate Minority Leader's office. The position reports directly to the chief of staff of the applicable leader. The position develops and implements the entire communications program for the applicable leader, oversees and manages the leader's outreach, promotional, media and public relations activities, events, and announcements; identifies, analyzes, and evaluates issues, events, and trends which impact the applicable

leader's legislative initiatives; formulates communication methods and strategies to use in response to these occurrences; provides complex and critical strategic planning, policy, trends, and tactical advice; advises the applicable leader and other majority or minority Senators, as applicable, on potential controversies, sensitive issues, problems, or negative impact and recommends communication strategies which are responsive to these issues; directs the preparation and distribution of or prepares and distributes press releases, news stories, opinion essays, and related information to the media; prepares speeches, announcements, background and briefing information for the applicable leader and other majority or minority Senators, as applicable; coordinates and oversees requests for the applicable leader's participation in public relations events; arranges press conferences and media interviews for the applicable leader and majority or minority Senators, as applicable; functions as the applicable leader's media spokesperson, directly responding to the media, and conducting press conferences; guides, reviews, and evaluates video presentations and publications for compliance with Senate policy and the applicable leader's standards; and designs, develops, and implements media campaigns for the purpose of explaining, promoting, and sharing the applicable leader's legislative initiatives and opinions.

Qualifications

The qualifications for this position will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

Legislative Staff Clerk

Class Description

Definition: This is a responsible nonpartisan position performing clerical work in the Senate coordinating activities of other staff and responsible for distribution of documents to Senate offices and the general public.

Qualifications

Required knowledge, skills, and abilities: Thorough knowledge of the legislative processes and procedures as it pertains to the production of official legislative bulletins and announcements; knowledge of modern office practices and procedures; ability to properly catalog and index official legislative actions; and ability to proofread and type effectively.

Training and experience: Graduation from high school and three years of office experience, or an equivalent combination of training and experience.

Senate Office LTE

Class Description

Definition: Employees in this classification perform a variety of tasks in the office of a Senator. They are appointed by the Senator and are paid by the hour. They are often employed in a limited basis to perform projects, although they may also be employed on an ongoing basis.

Examples of work performed: Answering phones, data entry, collating and filing, constituent services, policy analysis.

Qualifications

Required knowledge, skills, and abilities: Varies depending upon the services that will be provided to the Senate office. Typically requires at least some knowledge of the legislative process, ability to communicate with diverse groups of individuals, and the ability to follow instructions and work independently.

Training and experience: Varies depending upon the services that will be provided to the Senate office. Typically requires at least graduation from high school and often attendance at or graduation from college or an equivalent combination of training and experience.

Legislative Head Clerk

Class Description

Definition: This is a very responsible, nonpartisan, clerical position providing a variety of specialized services which contribute to the prompt and correct publication and distribution of legislative documents, the processing of payroll and human resources information, and the dispatching of messenger staff. Responsibilities also involve the production of legislative publications such as the Senate Journal, the Bulletin of Proceedings, the Senate Calendar, and the Weekly Schedule of Committee Activities.

Qualifications

Required knowledge, skills, and abilities: Knowledge of the Senate Rules; knowledge of the requirements and deadlines in publishing official documents; ability to understand specialized phases of the legislative process; ability to take accurate and complete notes; and ability to deal with difficult and complex working conditions.

Training and experience: Graduation from an accredited college or university and two years of office experience, or an equivalent combination of training and experience.

Session Messenger

Class Description

Definition: This is a nonpartisan position. Employees in this classification perform a variety of tasks for Senators. Work is performed under close supervision within the Sergeant at Arms office. Positions within this classification are for a limited term, expiring no later than August 31

of each even-numbered year. The limited term nature of these positions does not abrogate their employment-at-will status.

Examples of work performed: Delivery of messages; collating of printed materials; registration of speakers and visitors at public hearings; operating audio-visual equipment; and other general tasks as directed.

Qualifications

Required knowledge, skills, and abilities: Some knowledge of the legislative process; ability to meet and greet people who are registering; and the ability to follow instructions.

Training and experience: Graduation from high school or an equivalent combination of training and experience.

LTE (Hourly) Messenger

Class Description

Definition: This is a nonpartisan position. Employees in this classification perform a variety of tasks for Senators. Work is performed under close supervision within the Sergeant at Arms office. Positions within this classification are compensated on an hourly basis.

Examples of work performed: Delivery of messages; collating of printed materials; registration of speakers and visitors at public hearings; operating audio-visual equipment; and other general tasks as directed.

Qualifications

Required knowledge, skills, and abilities: Some knowledge of the legislative process; ability to meet and greet people who are registering; and the ability to follow instructions.

Training and experience: Graduation from high school or an equivalent combination of training and experience.

VI. Appendix ~ Benefit Summary

Benefited Employee Information

The benefit package for employees of the Senate is very comprehensive, covering the full range of benefits from health insurance to disability insurance to retirement. The current (2012) ratio of salary to benefits is 37.71% for staff. Below are general descriptions of each benefit. Please refer to specific plan documents that are provided during benefit orientation for further details and interpretation of these benefits. In the event the terms and conditions of the benefit plan itself conflicts with the terms as described in this policy manual, the terms and conditions of the benefit plan will control.

General questions relating to insurance and employee fringe benefits should be directed to the Legislative Human Resources Office (LHRO) at 608-264-8471.

The employee is responsible for notifying the LHRO of any change in family status (i.e., marriage, divorce, birth/adoption of dependent, etc.) for insurance purposes. This must be done within 30 days of occurrence. This timely notice is required in order to have the employee complete the necessary paperwork for changes in benefits. Failure to comply with this timely notification can result in delay, alteration, or possible denial of coverage.

Wisconsin Retirement System

All benefited legislative employees must participate in the Wisconsin Retirement System. Benefited employees are required to contribute 6.65% (2013 rate) of their gross monthly salary into their retirement fund – the State matches this contribution. General employees are eligible for retirement at age 55 (57 with 30 years of service to receive full benefits) with annuity amounts based on several factors including length of service, highest three years of career salary and market performance. For more information regarding the Wisconsin Retirement system, please visit the following link:

http://etf.wi.gov/members/benefits_wrs.htm

Health Insurance

The State of Wisconsin offers several different comprehensive health plans throughout the state. In general, plans are required to provide uniform benefits and may choose to offer additional benefits (i.e., dental benefits) at a uniform premium to the employee. Standard and maintenance plans are available, at a higher cost, for additional coverage needs.

Co-pays, co-insurances and other fees may apply depending on the coverage chosen and the type of service provided.

Coverage may also be available for adult children and domestic partners. For more information regarding the available health plans, please visit the following link:

http://etf.wi.gov/members/health_ins.htm

Epic Benefits+ Supplemental Dental Insurance

Epic Benefits+ supplemental insurance is an additional benefit that enhances your base insurance plan(s). The plan offered to State of Wisconsin employees from EPIC provides you with additional dental (major services), hospital and surgery, and accidental death and dismemberment coverage, along with the option to purchase additional vision coverage. For more information, please visit the following link:

http://www.epiclife.com/products/state_intro.shtml

EPIC Dental Wisconsin Supplemental Dental Insurance

Epic Dental Wisconsin supplemental dental insurance can enhance your base dental coverage provided by your health insurance by providing additional coverage for preventative, basic or major dental work. For more information, please visit the following link:

http://www.epiclife.com/products/state_dental_wi.shtml

Anthem DentalBlue Supplemental Dental Insurance

Anthem DentalBlue supplemental dental insurance can enhance your base dental coverage provided by your health insurance by providing additional coverage for preventative, basic or major dental work. For more information, please visit the following link:

<http://www.anthem.com/dental-stateofwi/>

Vision Service Plan (VSP) Supplemental Vision Insurance

VSP supplemental vision insurance can enhance your base vision coverage provided by your health insurance by providing discounts for eyewear and contact lenses and exams. For more information, please visit the following link:

<https://vsp.com/go/stateofwiemployees>

Group Term Life Insurance

Benefited employees are eligible for term, group life insurance available through the State of Wisconsin. The maximum benefit is equal to five times an employee's annual salary. Spouse and dependent coverage is also available up to \$20,000 and \$10,000, respectively.

Premium rates are based on age and salary and are updated yearly.

As required by the Internal Revenue Service, an imputed value is calculated on life insurance coverage in excess of \$50,000.00. The value computed appears on each employee check stub and W-2 and is added to wages for tax calculations.

An application must be filed with the LHRO within 30 days of employment indicating whether coverage is requested or not and if so, what level of coverage is desired. If an application is not completed in that time frame, the employee is required to complete an evidence of insurability form to request coverage. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_life_ins.htm

Accidental Death and Dismemberment Insurance

Accidental death and dismemberment coverage can help to provide 24-hour, worldwide insurance protection in the event of a severe injury, paralysis or death resulting from an accident.

Benefits are payable for losses which occur within 365 days of the accident.

Because the plan offers individual (or family) policies at group rates, you get the protection of a major insurer, the Hartford, without the high cost.

If you are a Wisconsin state employee in an active, full-time, part-time (at least 20 hours per week) or seasonal status, you are eligible for this coverage. You cannot be refused acceptance, and no evidence of insurability is needed. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_ADD.htm

Income Continuation (Disability) Insurance

This plan will replace up to 75% of your salary in the event you should become 100% disabled.

The plan provides replacement income for disabilities that are considered short term in nature as well as those which may last for extended periods. Depending on your age at the time disability commences, the plan may continue disability payments until age 70. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_ici.htm

Long-Term Care Insurance

This program will provide long-term care insurance for an employee, spouse, and the parents of either the employee and/or employee's spouse. The program covers care for such items as nursing home care, home health care, assisted living, and community-based living. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_ltc.htm

Employee Reimbursement Account Program / Flexible Spending Account

A Flexible Spending Account (FSA) allows you to set up an account to pre-fund your anticipated, eligible dependent day care expenses or medical services and supplies that are normally not covered by your insurance. You decide how much to set aside and that amount is deducted

from each paycheck before your Federal, State, and FICA taxes are calculated, saving you money on taxes. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_era.htm

Deferred Compensation

The WDC is an Internal Revenue Code Section 457 deferred compensation plan. With a WDC account, you can invest pre-tax or Roth (post-tax) dollars in a variety of investment options.

Pre Tax: If you choose the pre-tax option, these deferrals reduce your taxable income, which in turn, lowers your current state and federal income taxes. Also, any interest/gains you earn are tax free (until you withdraw the funds).

Roth (Post Tax): If you choose the Roth (post-tax) option, your deferrals are taxable in the year you make them. They are not taxed when distributed. Earnings are also not taxed, provided that your age is at least 59 1/2 and you have held your Roth account for at least five years. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_def_comp.htm

Commuter Benefits Program

The Commuter Benefits Program allows employees to set aside money on a pre-tax basis and use these monies to reimburse themselves for out-of-pocket transportation costs like leased parking spots, van pool, and bus passes. This program can be started, changed, or stopped at any time. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_commuter.htm

United States Savings Bonds

U.S. Savings Bonds are available on a payroll deduction basis. Contact the LHRO for further details.

Direct Deposit

Direct Deposit of regular monthly paychecks into multiple accounts is available to all employees. Funds can be deposited at almost any financial institution in numerous accounts. Contact the LHRO for more information and/or to enroll.

Edvest College Savings Program

When you contribute to the Edvest College Savings Plan, any account earnings can grow federal and Wisconsin income tax-free. Plus, withdrawals used to pay for qualified higher education expenses will be free from federal and Wisconsin income tax. Non-qualified withdrawals may be subject to federal and state taxes and the additional federal 10% tax.

If you are a Wisconsin taxpayer, your contributions to Edvest reduce Wisconsin taxable income up to a maximum of \$3,000 per year. Please visit the following link for more detailed information:

<https://www.edvest.com/>

VII. Appendix ~ Harassment and Discrimination

Introduction

Respect is an integral part of the foundation of any type of relationship. It fosters communication, facilitates the learning process and strengthens cooperation amongst staff while working toward common goals.

Consequently, the Senate is committed to assuring that it operates in an environment that is free from discrimination and harassment based upon race, ethnicity, sex, pregnancy, color, religion, national origin, physical or mental disability, age (40 and over), marital status, sexual orientation, gender identity, genetic information, status as a U.S. Veteran, or any other status protected by state or federal law.

In addition to ethical and legal reasoning, discrimination and harassment impedes our ability to perform our duties at the highest level possible by diminishing the work place dynamic with fear, animosity and favoritism resulting in unreliable, unproductive and, most importantly, unhappy staff in an unacceptable workplace environment.

For these reasons, the Senate will not tolerate discrimination or harassment, as defined below, and is committed to preventing or stopping it whenever it may occur. The policy presented here applies directly to the Senate, however, we will take every action necessary to protect our employees from discrimination and harassment from external sources as well.

Discrimination and Harassment Defined

The Senate prohibits discrimination, which can include disparate treatment directed toward an individual or group of individuals based on race, ethnicity, sex, pregnancy, color, religion, national origin, physical or mental disability, age (40 and over), marital status, sexual orientation, gender identity, genetic information, status as a U.S. Veteran (disabled, Vietnam, or other), or other protected class, that adversely affects their employment. For religion or disability, the law allows employees and students to request reasonable accommodations to continue their work.

The Senate also prohibits harassment, which can be a form of discrimination if it is unwelcome and is sufficiently severe or pervasive and objectively offensive so as to substantially interfere with a person's work. Harassment may include, but is not limited to, threats, physical contact or violence, pranks, jokes, bullying, epithets, derogatory comments, vandalism, or verbal, graphic, or written conduct directed at an individual or individuals because of their race, ethnicity, sex, pregnancy, color, religion, national origin, physical or mental disability, age, marital status, sexual orientation, gender identity, genetic information, or U.S. Veteran status. Even if actions are not directed at specific individuals, hostile work environments may be created when the conduct is sufficiently severe and/or pervasive and objectively offensive enough so as to substantially interfere with the ability of an individual to work.

It is our goal to prevent the occurrence of discriminatory and harassing activity and to promptly stop such conduct when we become aware of potential violations. In that respect, it is

imperative that all instances of potential discrimination and/or harassment be reported to the appropriate supervisor or human resources immediately. While based on state and federal law, this policy may cover behavior which, may not meet the legal definition of harassment, are unacceptable and not tolerated in the Legislature. This policy will be interpreted so as to avoid infringement upon First Amendment rights of free speech.

1. Sexual Harassment

Sexual harassment includes unwelcomed sexual advances, requests to engage in sexual conduct, and other physical and expressive behavior of a sexual nature where:

(a) submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment or education;

(b) submission to or rejection of such conduct by an individual is used, or threatened or suggested to be used, as the basis for employment decisions affecting the individual (Quid Pro Quo);

(c) such conduct substantially interferes with an individual's performance or creating an intimidating, hostile, or demeaning work environment.

Determination as to whether the alleged conduct constitutes sexual harassment should take into consideration the totality of the circumstances, including the context in which the alleged incidents occurred.

Under this policy, sexual harassment can be verbal, visual, or physical. It can be overt, as in the suggestion that a person could get a raise in salary or promotion by submitting to sexual advances. The suggestion or the advance need not be direct or explicit--it can be implied from the conduct, circumstances, and relationships of the persons involved.

Sexual harassment can also consist of persistent, unwelcome attempts to change a professional relationship to a personal one.

It can range from unwelcome sexual flirtations and inappropriate demeaning of individual persons or classes of people to physical contact/abuses such as sexual assault.

Examples could include, but are not limited to: unwelcome sexual advances; repeated and unwelcome sexually-oriented bullying, teasing, joking, or flirting; verbal abuse of a sexual nature; commentary about an individual's body, sexual prowess, or sexual deficiencies; derogatory or demeaning comments about women or men in general, whether sexual or not; leering, touching, pinching, or brushing against another's body; or displaying objects or pictures, including electronic images, which are sexual in nature and which create a hostile or offensive work environment.

The interpretation of sexual harassment in the law and the Senate's policy provides that:

- Sexual harassment generally carries a component of power differential between individuals and can occur between men and women or between members of the same sex
- An employee does not have to suffer economically before harassment can be found
- A person who, on the surface, consents to sexual advances might still be subjected to harassment
- Whether conduct is welcome or unwelcome depends on the "eye of the beholder" and a "reasonable person" test
- Offenders can be supervisors, co-workers, or non-employees such as vendors, customers, or suppliers
- A third person can be offended by harassing behavior among willing participants
- Harassment does not have to be reported soon after it occurs to be redressed
- A single incident or a few incidents, generally, will not be illegal harassment; however, a single incident of unwanted touching of a person's intimate body part could be sexual harassment
- Non-sexual but abusive, hostile, rude, or harsh treatment of members of one gender may also constitute harassment

2. Consensual Relationships

Sexual, romantic, or intimate relationships between persons in a supervisor/subordinate relationship that appear to be voluntary and welcome may nonetheless constitute sexual harassment under this definition. Relationships between a supervisor and those employees whom he or she supervises may give rise to legal and ethical concerns or to conflict between personal and professional interests. Although such a relationship may be viewed by the parties involved as consensual, that fact alone does not mean that no sexual harassment exists.

Relationships between supervisors and subordinates are not allowed in the Senate. Supervisors involved in such relationships have the obligation to remove themselves from the consensual relationship.

3. Racial and Ethnic Harassment

Harassment that is directed at a person or group of persons because of race, color, ethnicity, or national origin is covered under this policy. Even if actions are not directed at specific persons, a hostile environment can be created when the conduct is sufficiently severe or pervasive and objectively offensive so as to substantially interfere with the person's work or employment experience.

4. Harassment Based on Religion, Disability, Pregnancy, Age, Marital Status, Sexual Orientation, U.S. Veteran Status, or Other Protected Status

Harassment that is directed at a person or group of persons because of any characteristic protected by this policy or local, state or federal law is also covered under this policy.

5. Retaliation

Retaliation against an individual for making a complaint of discrimination or harassment, even if they are not the victim or for resisting discrimination or harassment is a violation of Senate policy, and any such action is itself cause for disciplinary action and will not be tolerated.

6. Violence

Most incidents of workplace violence are not lethal, yet have devastating physical and emotional consequences for vulnerable victims. Such incidents incur huge costs for employers. Examples of non-lethal violence include:

- Teasing and practical jokes that cause anger and humiliation
- Intimidation, bullying
- Angry outbursts
- Verbal abuse, name calling, biting sarcasm or obscene language
- Threats (verbal, written or gesticulated)
- Harassment (general and sexual)
- Theft, vandalism and sabotage
- Throwing or breaking objects
- Hitting, pushing, poking, slapping, grabbing, and other forms of physical battery
- Romantic obsessions and stalking
- Sexual assault and rape

7. Complaint Resolution

In an effort to prevent or stop discriminatory or harassing behavior, the Senate has adopted specific avenues through which an individual can make his or her complaint known. With issues of discrimination and harassment, it is important to identify and remedy the situation as soon as possible. For this reason, we have established two complaint resolution methods that employees may use to raise discrimination and harassment concerns - informal and formal resolution. Claims of discrimination and harassment must be brought either as an informal complaint or a formal complaint to ensure that appropriate action can be taken right away. An informal complaint may, but need not be made before filing a formal complaint.

To best remedy a situation, complainants or witnesses are urged to promptly share concerns or complaints rather than risking their well-being or negatively affecting the Senate ability to investigate their case due to the passage of time and potential departure of witnesses. Additionally, certain state or federal time restraints may impact the resolution of violations.

7.1 Informal Resolution

This process allows for the prompt and discrete resolution through communication, education, and/or mutual agreement. If informal resolution fails to resolve the matter to the complainant's satisfaction, the complainant may file a formal complaint.

Under the informal process, the complainant must bring the complaint, either verbally or in writing, to a supervisor with authority over the person against whom the complaint is directed. Because it is often more efficient to resolve matters locally, bringing the informal complaint to a supervisor with immediate authority over the person is useful, but not required. If a complainant is not comfortable speaking with a supervisor, informal complaints may also be raised to any member of the supervisory chain or the Legislative Human Resources Office.

In all cases, confidentiality will be adhered to at the request of the complainant until such time that the investigating supervisor deems it is necessary to escalate the complaint due to concerns of safety, employer liability, seriousness of charges or other relevant information. In the case of escalation, the investigating supervisor will consult with Human Resources for legal review before escalating the case unless safety considerations are eminent.

Supervisors should attempt to resolve complaints expeditiously, but consistent with the severity or complexity of the matter. As a guideline, supervisors should attempt to complete the informal resolution process within three weeks after receipt of the complaint.

7.2 Formal Resolution

A person who wishes to file a formal complaint must do so in writing. The formal complaint should be as detailed as possible to include the individuals involved, violations/behavior, locations, dates/times, witnesses and any other information relevant to the complaint.

The formal sexual harassment complaint process is designed to resolve complaints that cannot be resolved through the informal report and resolution process or that the complainant chooses to have investigated and judged in a formal setting. Although the process is confidential, the complainant's identity cannot be withheld from the person they are accusing.

The formal complaint procedure is set up to take no more than 80 working days in order to allow access to the legal remedies available under any other applicable federal or state laws. To have remedy under this formal complaint process, complaints must be filed within three years of the last incident.

Please contact the Senate Chief Clerk and/or the Legislative Human Resources Manager and/or any member of the Committee on Senate Organization as soon as possible to begin a formal complaint.

Employee Assistance Program (EAP)

The Deer Oaks Employee Assistance Program is a free service to all Senate employees and their dependents. This program offers a wide variety of counseling, referrals, and reference services, all designed to make your family healthier, happier, and provide for a more balanced work and

home life. These services fall under HIPAA confidentiality rules. Please visit the following website for more information:

<http://www.deeroaks.com/>

Confidentiality

Persons seeking general information or guidance about harassment or discrimination may be concerned about whether the information they share with another person will be confidential. While the Senate strives to maintain a safe environment in which individuals can be unafraid to discuss concerns and make complaints, legal obligations may require us to take some action once it is informed that harassment or discrimination may be occurring. Because of their positions of authority, certain personnel are obligated to take action when they receive a complaint of harassment or discrimination. Although the confidentiality of the information received and the privacy of the individuals involved cannot be guaranteed, they will be protected to as great an extent as is legally possible. The expressed wishes of the complainant regarding confidentiality will be considered in the context of our legal obligation to act upon the charge and the rights of the charged party to be informed concerning the charge.

Sanctions

Employees found to have engaged in discrimination or harassment in violation of this policy are subject to appropriate discipline up to and including termination of employment.

VIII. Appendix ~ Guidelines Regarding Legislator and Legislative Staff Use of State-Supported Websites and Social Networking Technology

This document provides guidance regarding the applicability of Chapter 11 of the Wisconsin Statutes, relating to campaign financing, and Chapter 19 of the Wisconsin Statutes, relating to the code of ethics for public officials, to the use of state-supported websites and social networking technology. This document does not attempt to capture all possible situations related to these technologies.

The use of state-supported websites and social networking technology by legislators and their staff shall conform to all legislative rules and policies and all applicable federal, state, and local laws.

General Use

Legislators and their staff may use state resources to create, post information to, and maintain state-supported websites, herein referred to as legislator homepages, to communicate for legislative purposes. Each legislator is responsible for the content of his or her legislator homepage.

Legislators and their staff may use state resources to use social networking technology, such as Facebook, Twitter, LinkedIn, FourSquare, Google+, etc.; to communicate for legislative purposes.

Legislators and their staff may not use state resources to create, post information to, or maintain campaign or business websites.

Each substantially identical posting created with state resources to a legislator homepage or social networking website counts as *one* of the 50 pieces as specified in s. 11.33, Wisconsin Statutes. However, messages sent directly to individuals using social networking technology count as *one piece per recipient*. The distinction is that with posts to a legislator homepage or social networking website, individuals elect to visit the website or receive notices that the social networking systems themselves distribute. Thus, creating a post is like issuing a single press release to the media, which in turn may distribute it to any number of people. Whereas with direct messages, the sender has to select the recipients which is similar to sending email or postal mail.

Legislators and their staff may add links on their legislator homepages to any content or website used to communicate for legislative purposes, including links to their *legislative social networking websites*, except they should not contain links to websites containing campaign or business content.

Use of Legislative Social Networking Websites

Legislators and their staff may use state resources to create, post information to, and maintain *legislative social networking websites* defined as social networking websites which exclusively contain material used to communicate for legislative purposes.

Each legislator is responsible for the content of his or her *legislative social networking websites*. If *legislative social networking websites* are used, the legislative office should either 1) prohibit others from posting material on them or 2) regularly review the websites to remove inappropriate material. This is no different than policing the materials on a state-paid bulletin board.

Legislators and their staff may add links on their *legislative social networking websites* to any content or website used to communicate for legislative purposes, except they should not contain links to websites containing campaign or business content.

Use of Mixed-Content Social Networking Websites

Legislators and their staff may post content to websites that contain a mix of *legislative*, *personal*, *business*, and *campaign* materials, as long as they adhere to the following:

1. state resources should not be used to *create* the mixed-content websites;
2. *legislative staff* may publish *legislative content* to mixed-content websites, while using state resources, as long as that legislative content is also distributed more broadly to the press and public;
3. *legislative staff* may publish *personal*, *business*, or *campaign material* to mixed-content websites only on personal time and without using state resources; and
4. *Legislators* may post any type of content to any website at any time as long as they do not use state resources to post *campaign* or *business* content.

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